

OPTIMA FAQ

How often should I be checking Optima?

- We recommend that you are logging in to Optima 2-3 times a week (or more). However, the expectation is that all advocates will log in at least once per week.

What should I be checking each time I log in to Optima?

1. Contact Logs: Be sure that all submitted contact logs have been “APPROVED” by your supervisor. If “DENIED”, open and correct the submitted logs as needed. If unsure about what needs to be corrected, open the contact log and view the notes.
2. Calendar: Look at the current month and upcoming month. Have any new dates been added? (hearings, court report deadlines, PCs, etc.)
3. New Docs: “New Docs” will show any documents uploaded to your case file in the last 14 days. Review any documents that you have not yet viewed.

How much time do I have to enter a contact after it happens?

- In order for an ideal exchange of current information, advocates are encouraged to enter contact records within 24 hours of the exchange. All contact records should be entered within 72 hours. Conversely, all contact logs should have a response of approved or denied within 72 hours of receipt by CASA supervisors.

I’m entering contact with my supervisor, but her name isn’t on the list to choose from. What should I do?

- Because all contact logs are approved directly by your supervisor, it is not necessary to select a name. As long as the Activity Type is “Supervision with CASA Staff”, your supervisor’s name is not required. If, however, you receive supervision from a staff member other than your normal supervisor (i.e. Kim or Janet), please type the name of the person you received supervision from in the boxes provided to the right.

Why don’t I get a notification email when my contacts are denied or when new documents are uploaded?

- In order for Optima to be useful for both parties, it is critical that both staff and advocates are logging in to Optima regularly. Developing a habit of checking your case file on a weekly basis will be critical to your success. Because of that, notifications are not sent, but your “new” records will always be easy to find.

Are CASA Community Groups Training? If not, what are they?

- CC Groups will vary in purpose from group to group and month to month. Each CC Group will most likely fit under “Training Logs” or as “Staffing/Team Meeting”, or some combination of the 2. Janet will disclose at the end of each group how to document your time based on the content addressed during your gathering.

OPTIMA FAQ

What do I do if the placements I need aren't on the list? Caseworkers/attorneys/etc?

- You should be aware that while you are able to add placement providers (foster parents, facilities, etc), caseworkers, and attorneys to your case file, you are only able to add parties from the lists provided. If you'd like to add one of these parties (or doctors, therapists, schools, etc.), and your provider is not on the list, you may request ANY CASA staff member to add the appropriate information to the list provided. You may call, email, or text the name of the party with any known contact info, and we will add it to the menu. Because Optima is new there will be a number of "Associated Parties" missing from the menus. We hope that this will not deter you from utilizing the feature, but that you will help us build each menu to be complete and accurate!

How do I submit my court reports through Optima?

- An attachment addressing this question will be provided online on the "Advocate Resources" page of the CASA website.

Which Contact categories should I be using for which activities? Contact with caregivers?

- An attachment addressing this question will be provided online on the "Advocate Resources" page.

If I call, text, and email the same party in the same day, do I need to log all of those contacts separately?

- Not necessarily. If you, for example, text, call, and email both parents of a child separately you may enter a single contact log with the appropriate "Activity Type" (Contact/Visit: Family) and ONE of the appropriate Contact Types (phone) selected. You will select both parties contacted in the boxes provided to the right. In the notes be sure to note the other contact types that were utilized in the same day (i.e. "also emailed and texted both parents"). You may use this method for entering multiple contacts provided that:
 - o The contacts all occurred on the same date
 - o The parties selected all fall under the same "Activity Type" (i.e. they are all family, or all legal contacts, etc.)

How do I get the Optima App on my phone or tablet?

- Optima does not have a separate App to be downloaded, but you can access the Mobile version of Optima, "Optima Go" from your phone or tablet. You will access Optima through the website, the same way you do on a desktop/laptop computer. If Optima detects you are using a mobile device, it will default to opening Optima Go. Through Optima Go you can enter contact logs, view hearing notes, and view case documents.

What do I do if my case file is missing documents?

- Most cases have their documents scanned in, but some do not. If your case file is missing documents from prior to August 31st, let your supervisor know. She will scan in any existing paper contents of your case file for your viewing as needed.

OPTIMA FAQ

Who will upload documents to Optima?

- New documents will be uploaded to Optima by advocates AND by supervisors. If you receive (or produce) a new case related document, you are encouraged to upload it to Optima to 'share' it with your supervisor. For files sent by email to you AND your supervisor, we are asking that you upload the files to Optima once received. If supervisors receive files that you did NOT receive, they will upload the file to share it with you.

Can I print reports through Optima?

- You can access a report summary of all of the notes that you have entered into your contact logs. If viewing the "Contact Logs" tab of your case, there will be a blue "View Notes" button on the right side of your screen. This will pull a summary of all notes entered into your case. You may also select "Search" to view a filtered version of notes (i.e. notes within a certain date range, note exchanged with a particular party, etc.)

What would I track as "expenses"?

- Any expenses you incur while performing the work of an advocate, excluding fuel, can be tracked. This is most commonly games, gifts, meals, snacks, or other items purchased for your CASA child or for your CASA visit. These expenses will be tracked along with your mileage. At the end of the calendar year, we can create an individualized IRS tax report for you, showing your total annual expense, mileage, and time donated to CASA.

Can I edit contact logs or training logs once submitted for approval?

- You can edit any logs that are submitted, but still pending. Once approved, you will not be able to make any edits or additions. Supervisors DO have access to edit approved contact logs so if changes need to be made, you may either (1) submit a new log with the updated information, or (2) contact your supervisor to amend the previously submitted log.

Who has access to my calendar? What can I expect to see on my Calendar? Am I Required to use the calendar for CASA Activities?

- Your Optima calendar is private to you and your supervisor. Other advocates cannot view the events on your calendar. Your calendar will automatically show hearing dates and court report due dates, as entered by your supervisor. It will also show any other permanency or family group conference dates that your supervisors enter into the calendar. *This will be the notification method for any hearings or meetings occurring 10 or more days after the date of notification.* You are required to check your calendar at least once per week for any events added by your supervisor, but beyond that, there are no requirements for calendar usage. You are encouraged, however, to add dates and times of child visits to your calendar so that supervisors have advanced notice of scheduled visits, and can reach out to you with any questions or concerns prior to your visit.