



***Optima***<sup>™</sup>

**Manual for Advocates**

# How To Input A Contact Log

This is what it looks like after you log in:




Welcome MariaPerezV  
Change Password | Log Off

Volunteers Dashboard Help

Address Book Personal Info

Cases To-Do List Training Logs Non-Cases Calendar New Docs

Case Number	Case Name	Petition Date	Action
1		10/12/2021	

Displaying items 1 - 1 of 1

1. Click the Notepad icon on the far right

ADD

**Contact Log**

Case Number: \_\_\_\_\_  
Case Name: \_\_\_\_\_  
Activity Date: 5/13/2022  
Activity Type: B6 Immigration Assistance  
Subject: ILP with youth  
Out of Court:   
Contact Type: In Person  
Hours: 2.75  
Mileage: 45  
Expenses: 50.00  
Notes: Daniela and I attended an ILP session. I helped her with translation as the ILP coordinator did not have someone who could help translate. This session was about money management, and Daniela learned about the importance of opening a bank account as she prepares to transition to adulthood. After the ILP meeting, we went to grab some ice cream and talked about her future goals.

Select	Pertains to	Party Type
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Caseworker
<input checked="" type="checkbox"/>		Child
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Resource Parent(s)
<input type="checkbox"/>		Therapist/Clinician
<input type="checkbox"/>		Vol/Supv/Atty
<input type="checkbox"/>		Vol/Supv/Atty

Others Contacted:

First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_

First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_

First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_

Cancel **Create**

1. Fill in all necessary information
2. "Expenses" is optional if you want to track them for tax purposes
3. In the "Notes" box, you can be as detailed as you want! The more details you add, the easier it will be for you to write your court report
4. On the top right, check the boxes of who the contact was with
5. In the "Others Contacted" section, other people you contact who are not in the above Contact box
6. When you are all done, click the **green CREATE** button!

If you are already in the CASE DETAILS page



Welcome MariaPerezV  
Change Password | Log Off



CASE DETAILS

**Case Information**

Case Number  
Case Name  
County  
Jurisdiction  
Priority Case?  
Petition Date  
Notes

**Legal Status**

Type	Date	End Date
Dependency	10/13/2021	

1 1

Displaying items 1 - 1 of 1

**Case Assignments**

Name	Type	Supervisor	Assigned	Released	Reason	Contact Info
		<input checked="" type="checkbox"/>	10/25/2021			
	Advocate	<input type="checkbox"/>	10/25/2021			

1 1

Displaying items 1 - 2 of 2

1. Scroll down to the bottom of the page

Contact Logs | To Do | Associated Parties | Documents | Petitions and Allegations | Hearings | Services | Placement History

**Add** View Notes Search


Name	Type	Subject	Date	Hours	Status	Action
	02-Attended Case-related Meeting(CFT, Probation.)		4/13/2022	1.5	Approved	Q
	01-Contact with Interested Party (PO,SW,Parent...)		3/28/2022	1	Approved	Q
	00-Contact with Child/Youth		3/26/2022	3.25	Approved	Q
	01-Contact with Interested Party (PO,SW,Parent...)		3/25/2022	0.5	Approved	Q
	00-Contact with Child/Youth		3/1/2022	0.25	Approved	Q
	00-Contact with Child/Youth		2/19/2022	3	Approved	Q
	00-Contact with Child/Youth		2/14/2022	0.5	Approved	Q
	00-Contact with Child/Youth		2/9/2022	0.5	Approved	Q
	09-CASA Research/Work		2/4/2022	1	Approved	Q
	00-Contact with Child/Youth		1/28/2022	0.25	Approved	Q
	01-Contact with Interested Party (PO,SW,Parent...)		1/28/2022	0.25	Approved	Q

1. Click the green ADD button on the top left

ADD

**Contact Log**

Case Number: \_\_\_\_\_  
Case Name: \_\_\_\_\_  
Activity Date: 5/13/2022  
Activity Type: B6: Immigration Assistance  
Subject: ILP with youth  
Out of Court:   
Contact Type: In Person  
Hours: 2.75  
Mileage: 45  
Expenses: \$0.00

Notes: Daniela and I attended an ILP session. I helped her with translation as the ILP coordinator did not have someone who could help translate. This session was about money management, and Daniela learned about the importance of opening a bank account as she prepares to transition to adulthood. After the ILP meeting, we went to grab some ice cream and talked about her future goals. 

(380 out of 5000)

Select	Pertains to	Party Type
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Attorney
<input type="checkbox"/>		Caseworker
<input checked="" type="checkbox"/>		Child
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Family Member
<input type="checkbox"/>		Resource Parent(s)
<input type="checkbox"/>		Therapist/Clinician
<input type="checkbox"/>		Vol/Supv/Atty
<input type="checkbox"/>		Vol/Supv/Atty

Others Contacted:

















First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_

First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_

First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_
















After you click the **green CREATE** button, it will then take you here

Contact Logs To Do Associated Parties Documents Petitions and Allegations Hearings Services Placement History

Name	Type	Subject	Date	Hours	Status	Action
	B6: Immigration Assistance		5/13/2022	2.75	Pending	 
	00-Attended Case-related Meeting(CFT, Probation...)		4/13/2022	1.5	Approved	
	01-Contact with Interested Party (PO,SW,Parent...)		3/28/2022	1	Approved	
	00-Contact with Child/Youth		3/28/2022	3.25	Approved	
	01-Contact with Interested Party (PO,SW,Parent...)		3/25/2022	0.5	Approved	
	00-Contact with Child/Youth		3/1/2022	0.25	Approved	
	00-Contact with Child/Youth		2/18/2022	3	Approved	
	00-Contact with Child/Youth		2/14/2022	0.5	Approved	
	00-Contact with Child/Youth		2/9/2022	0.5	Approved	
	09-CASA Research/Work		2/4/2022	1	Approved	
	00-Contact with Child/Youth		1/28/2022	0.25	Approved	
	01-Contact with Interested Party (PO,SW,Parent...)		1/28/2022	0.25	Approved	
	04-EduLearning Advocacy (EP, SQA, tutoring...)		1/27/2022	0.5	Approved	
	07-Young Adult Advocacy (Housing, Budget, Job...)		1/26/2022	0.25	Approved	
	01-Contact with Interested Party (PO, SW Parent...)		1/24/2022	0.25	Approved	

1. You will see that under **“Status”** it says **“Pending”**
2. That’s it, you’re all done!
3. Your supervisor will go in and approve!

To edit if needed:

Name	Type	Subject	Date	Hours	Status	Action
B6-Immigration Assistance			5/13/2022	2.75	Pending	
02-Attended Case-related Meeting(CFT, Probation...)			4/13/2022	1.5	Approved	
01-Contact with Interested Party (PO SW/Parent...)			3/28/2022	1	Approved	
00-Contact with Child/Youth			3/28/2022	3.25	Approved	
01-Contact with Interested Party (PO SW/Parent...)			3/25/2022	0.5	Approved	
00-Contact with Child/Youth			3/11/2022	0.25	Approved	
00-Contact with Child/Youth			2/18/2022	3	Approved	
00-Contact with Child/Youth			2/14/2022	0.5	Approved	
00-Contact with Child/Youth			2/9/2022	0.5	Approved	
06-CASA Research/Work			2/4/2022	1	Approved	
00-Contact with Child/Youth			1/28/2022	0.25	Approved	
01-Contact with Interested Party (PO SW/Parent...)			1/28/2022	0.25	Approved	
04-EdLearning Advocacy (EP-504 tutoring...)			1/27/2022	0.5	Approved	
07-Young Adult Advocacy (Housing, Budget, Job...)			1/28/2022	0.25	Approved	
01-Contact with Interested Party (PO SW/Parent...)			1/24/2022	0.5	Approved	

Click in the Notepad icon on the far right

ADD

**Contact Log**

Case Number: \_\_\_\_\_  
Case Name: \_\_\_\_\_  
Activity Date: 5/13/2022  
Activity Type: B6-Immigration Assistance  
Subject: ILP with youth  
Out of Court:   
Contact Type: In Person  
Hours: 2.75  
Mileage: 45  
Expenses: \$0.00

Notes: Daniela and I attended an ILP session. I helped her with transition as the ILP coordinator did not have someone who could help translate. This session was about money management, and Daniela learned about the importance of opening a bank account as she prepares to transition to adulthood. After the ILP meeting, we went to grab some ice cream and talked about her future goals. (380 out of 5000)

Others Contacted:  
First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_  
First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_  
First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_

\_\_\_\_\_ Attorney  
 \_\_\_\_\_ Attorney  
 \_\_\_\_\_ Attorney  
 \_\_\_\_\_ Caseworker  
 \_\_\_\_\_ Child  
 \_\_\_\_\_ Family Member  
 \_\_\_\_\_ Family Member  
 \_\_\_\_\_ Resource Parent(s)  
 \_\_\_\_\_ Therapist/Clinician  
 \_\_\_\_\_ Vol/Supv/Aty  
 \_\_\_\_\_ Vol/Supv/Aty

1. Edit as needed
2. Click the green **SAVE** button on the bottom left

**NOTE:** You are not able to edit after your supervisor approves your entry!

# How To Look Up Contact Info for Associated Parties (i.e., SW, Attorney, Therapist, etc.)

Family Members

Add

Name ▲	AKA ▲	Relationship ▲	Active ▲	Deceased ▲	Contact Info	Action
		Youth's Partner	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Q
		Mother	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Q

1 1

Displaying items 1 - 2 of 2

Contact Logs To Do **Associated Parties** Documents Petitions and Allegations Hearings Services Placement History

Add

Name ▲	Association ▲	Type ▲	Company ▲	Child ▲	Family ▲	Released ▲	Contact Info ▲	Action
	Interested Party	Therapist/Clinician	Monterey County Children's Behavioral Health	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q
	Attorney			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Q
	Interested Party	Resource Parent(s)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q
	Caseworker			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Q
	Attorney			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q
	Attorney			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q
	Caseworker		MCDSS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Q

1 1

Displaying items 1 - 7 of 7

1. Scroll down to the bottom of the page
2. Click the **“Associated Parties”** tab

# How Access Uploaded Documents

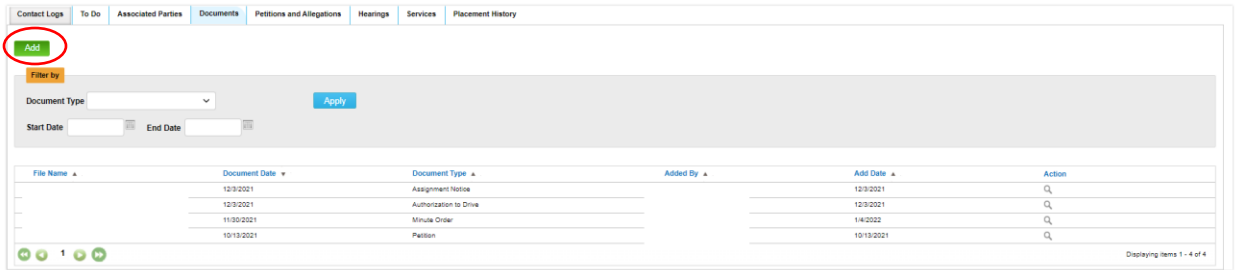
The screenshot displays a web application interface with several sections:

- Top Section:** A table with columns: Name, AKA/Alias, Gender, Age, Close Date, Volunteer, Supervisor, Next Hearing, and Action. It shows one record for a female aged 10, with a next hearing date of 5/31/2022.
- Current Placements:** A section with an 'Add' button and a table with columns: Name, Placement, From, Reason, With Siblings, Contact Name, Contact Info, and Action. It shows one record for 'Foster family home (non-relative, ISFC, FFA)' starting on 10/14/2021.
- Family Members:** A section with an 'Add' button and a table with columns: Name, AKA, Relationship, Active, Deceased, Contact Info, and Action. It shows two records: 'Youth's Partner' and 'Mother'.
- Navigation Tabs:** Contact Logs, To Do, Associated Parties, **Documents** (circled in red), Petitions and Allegations, Hearings, Services, Placement History.
- Documents Tab:** Contains a filter section with 'Document Type' (dropdown), 'Start Date', and 'End Date' (date pickers), and an 'Apply' button. Below is a table with columns: File Name, Document Date, Document Type, Added By, Add Date, and Action. The 'Action' column contains magnifying glass icons, with the top one circled in red. The table lists four documents: 'Assignment Notice' (12/9/2021), 'Authorization to Drive' (12/9/2021), 'Minute Order' (11/30/2021), and 'Petition' (10/13/2021).

1. Scroll down to the bottom of the page
2. Click the **“Documents”** tab
3. Click Magnifying Glass on the far right to download
4. Open download

**NOTE:** Remember to delete the document from your downloads folder on your computer

# How To Upload a Document



1. Click the **green ADD** button

 **ADD**

The screenshot shows the 'Document' form. It has a title bar 'Document' and a section 'Case'. The 'File Name' field is labeled '(Ctrl+click to multi-select)' and contains a 'Choose Files' button and the text 'No file chosen'. The 'Document Type' field is a dropdown menu with the text '<< Select Type >>'. The 'Document Date' field is a date input field with a calendar icon. At the bottom of the form, there are two buttons: a blue 'Cancel' button and a green 'Save' button, which is circled in red.

2. Click **Choose Files**
3. Enter document type
4. Enter document date
5. Click the **green SAVE** button



# How To Input Continuing Education Hours



The screenshot shows the Optima Volunteers Dashboard. At the top, there are icons for 'Volunteers Dashboard' and 'Help'. Below that are tabs for 'Address Book' and 'Personal Info'. A secondary set of tabs includes 'Cases', 'To-Do List', 'Training Logs' (circled in red), 'Non-Case', 'Calendar', and 'New Docs'. A green 'Add' button is also circled in red. Below the tabs is a table with the following data:

Complete Date	Training Topic	Hours
2/24/2022	20-Web/Zoom-General (title & summary)	1.5
2/9/2022	Community Resources (CASA hosted T IV-E)	1
1/31/2022	Meetings, Hearings & Reports (CASA hosted T IV-E)	2
1/29/2022	27-Web/Zoom-Mental Health (title & summary)	2
11/29/2021	Juvenile Justice (CASA hosted T IV-E)	1.5

1. Click the **“Training Logs”** tab
2. Click the **green ADD** button

The screenshot shows the 'In-Service Training' form. Fields include 'Schedule Date', 'Complete Date', 'Training Topic' (circled in red), 'Training Format', 'Trainer', 'Hours', 'Mileage', and 'Notes'. A dropdown menu is open for 'Training Topic', showing a list of options from '0-Optima Vol. Training' to '29 - Web/Zoom-Trafficking/CSEC'. At the bottom are 'Cancel' and 'Create' buttons.

1. Enter **“Scheduled Date”** & **“Complete Date”**
  - a. It is the same date, but both are required
2. Select the appropriate **“Training Topic”**

In-Service Training

Schedule Date

Complete Date

Training Topic

**Training Format**

<< Select a Value >>

CAL CASA/National CASA Organized CE

CASA Monterey Organized CE (in-person/remote)

Community Partner Organized CE (in-person/remote)

Independent/Self-Directed Study (in-person/remote)

Other (please describe in notes)

Trainer

**Hours**

**Mileage**

Notes   
(0 out of 2000)

Cancel
Create

1. In **“Training Format,”** select who hosted the training
  - a. If you read a book, article, or watched a movie, choose Independent Self-Directed  
NOTE: if you attend a training put on by CASA of Monterey, you do not need to enter it as we will do it for you!
2. Enter your hours (books = 3 hours, movie = 2 hours)
3. Enter mileage
4. In “Notes” please enter:
  - a. Title of the webinar/book/video/training
  - b. The three most important things you learned
  - c. How will this help you in your role as a CASA
  - d. Would you recommend to other CASAs? Why or why not?
5. Click the **green CREATE** button
6. You’re all done! Your supervisor will approve your training log

# How To Input Non-Case Hours



The screenshot shows the 'Volunteers Dashboard' with a navigation bar containing 'Address Book' and 'Personal Info'. Below this is a menu with 'Cases', 'To-Do List', 'Training Logs', 'Non-Case' (circled in red), 'Calendar', and 'New Docs'. A green 'Add' button is visible above a table of non-case activities.

Date	Event	Hours
5/21/2021	CASA Peer Engagement	1
4/15/2021	CASA Peer Engagement	1
3/22/2021	CASA Peer Engagement	1.25

1. Click the **“Non-Case”** tab
2. Click the **green ADD** button

The screenshot shows the 'Non-Case Activity' form. The 'Activity' dropdown menu is open, showing a list of activities including 'Board of Directors - Training', 'Board of Directors meetings, committees...', 'CASA Fundraisers', 'CASA Peer Engagement', 'CASA Picnic', 'CASM', 'Court Liaison', 'Gift of Giving', 'Info Session & Outreach events', 'Office Assistance', and 'Peer Coach'. The 'Activity', 'Hours', and 'Mileage' fields are circled in red. The 'Create' button is highlighted in green.

1. Enter Date
2. Select the appropriate Activity
3. Enter your hours and milage
4. In “Notes” please enter the type of event you helped in
5. Click the **green CREATE** button