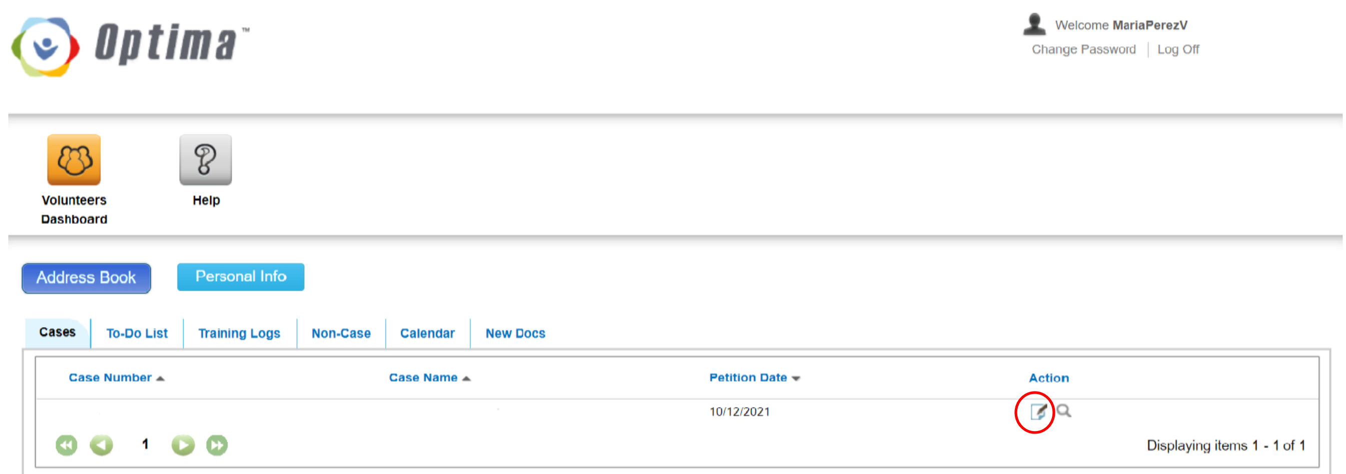
Optima™

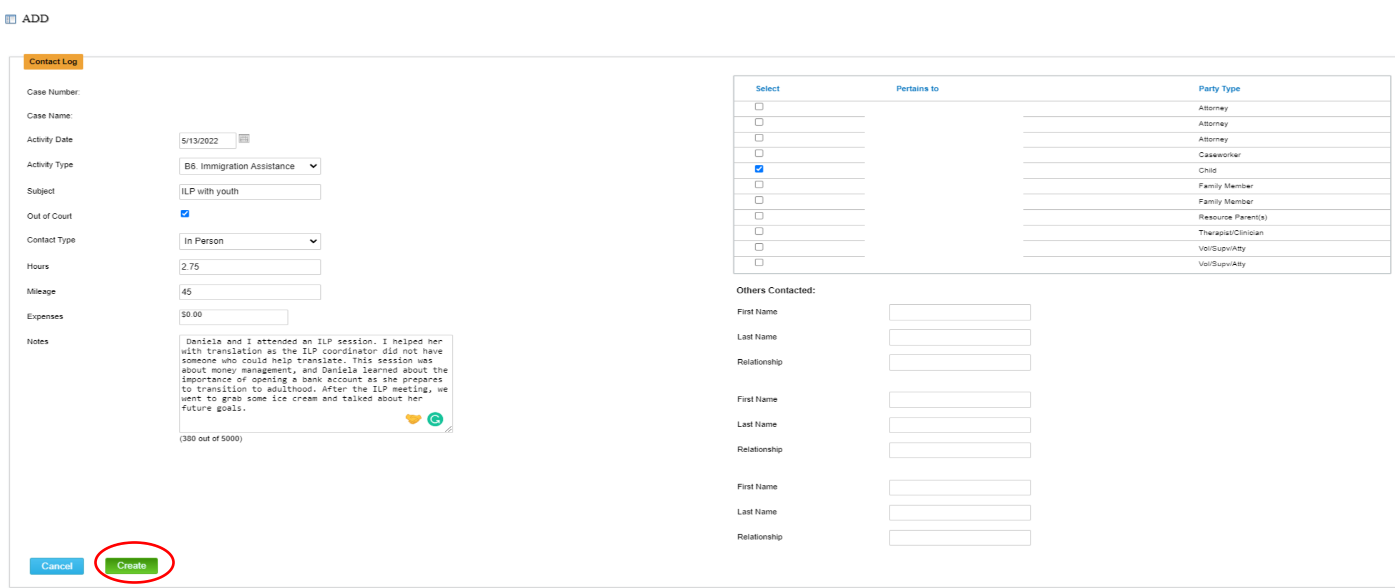
Manual for Advocates

How To Input A Contact Log

This is what it looks like after you log in:

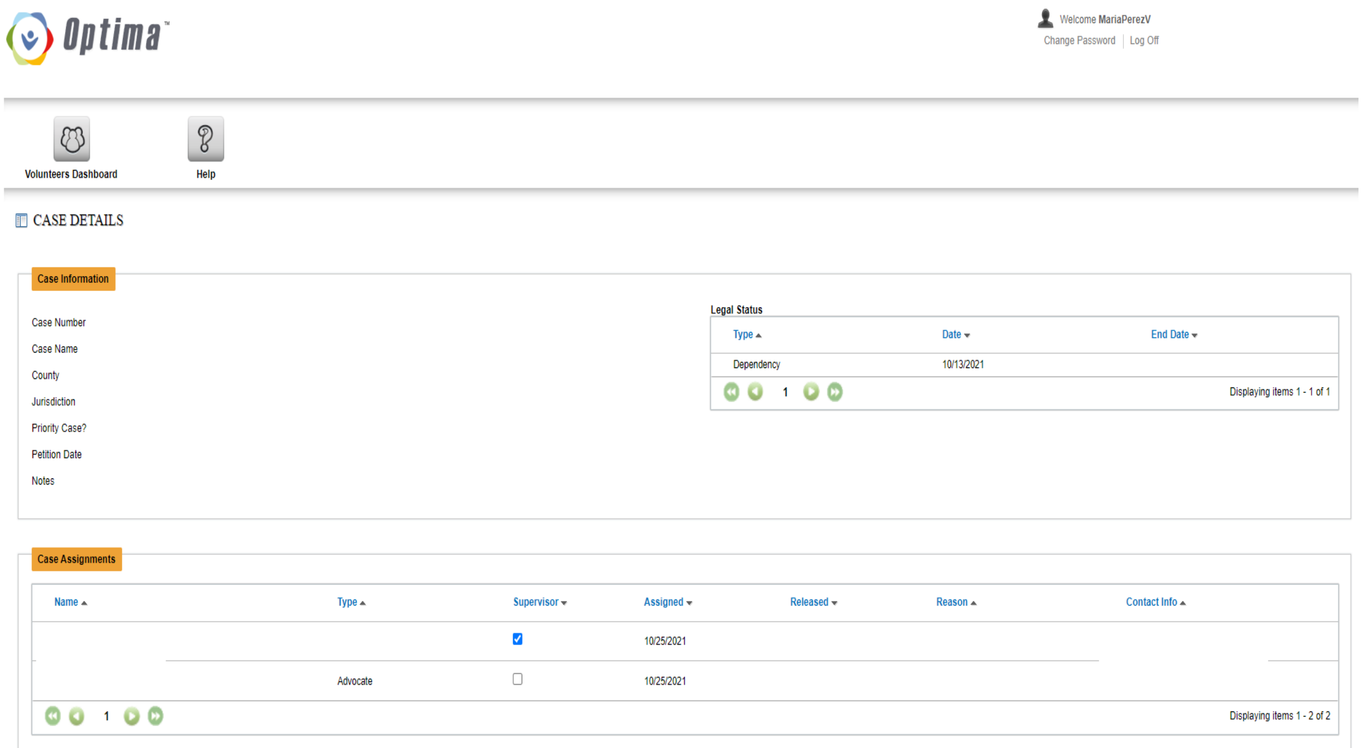


1. Click the Notepad icon on the far right

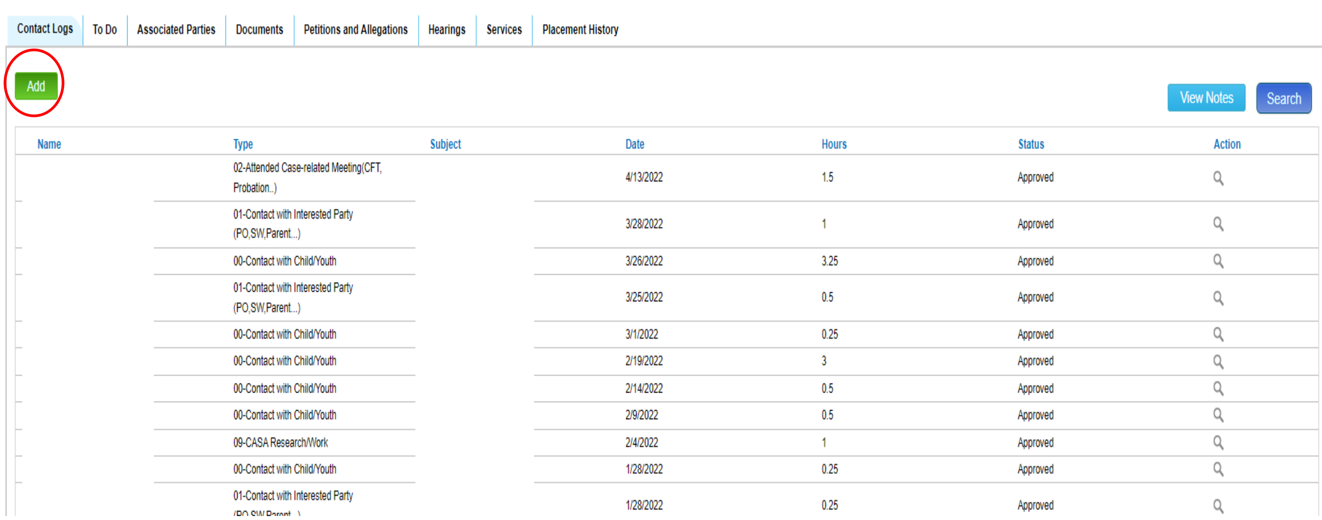


1. Fill in all necessary information
2. “Expenses” is optional if you want to track them for tax purposes
3. In the “Notes” box, you can be as detailed as you want! The more details you add, the easier it will be for you to write your court report
4. On the top right, check the boxes of who the contact 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!

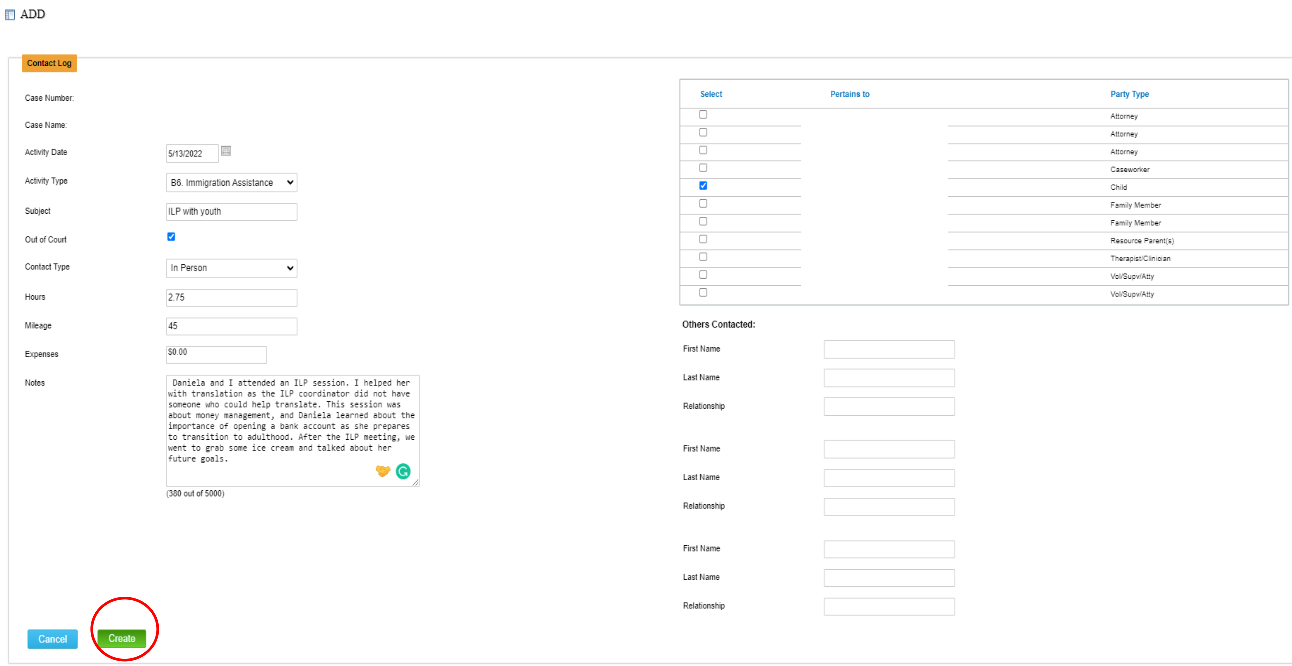
If you are already in the CASE DETAILS page



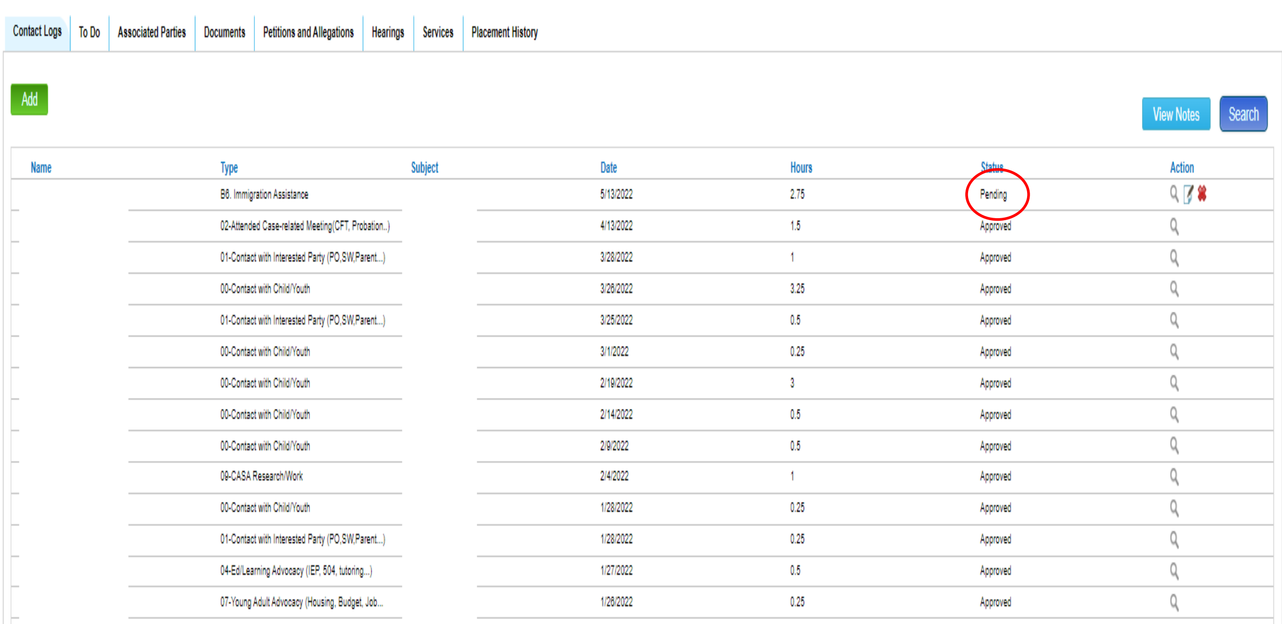
1. Scroll down to the bottom of the page



1. Click the green **ADD** button on the top left



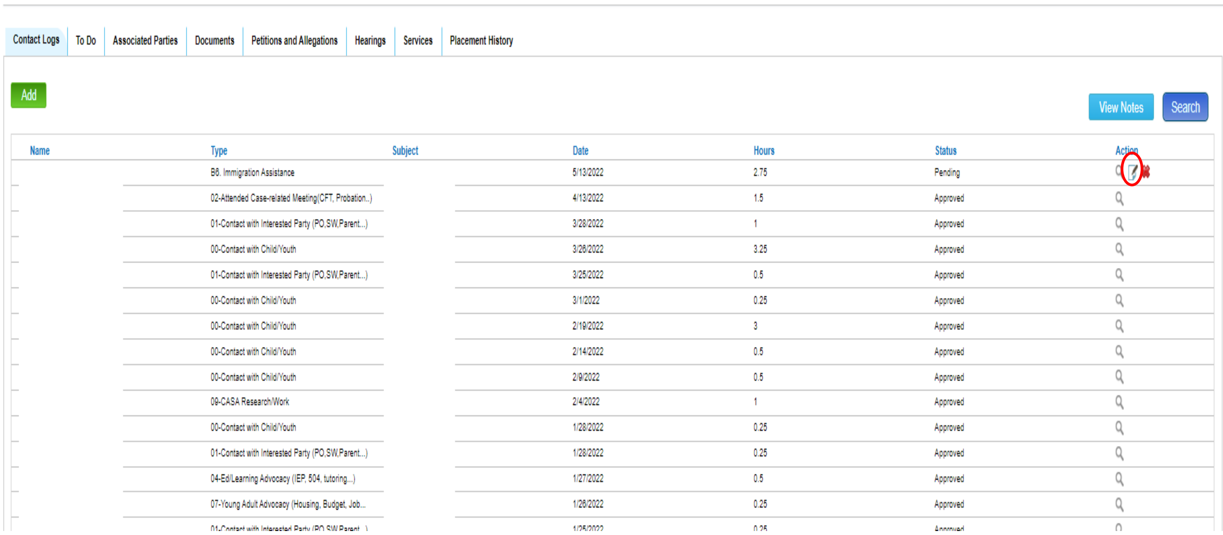
After you click the **green CREATE** button, it will then take you here



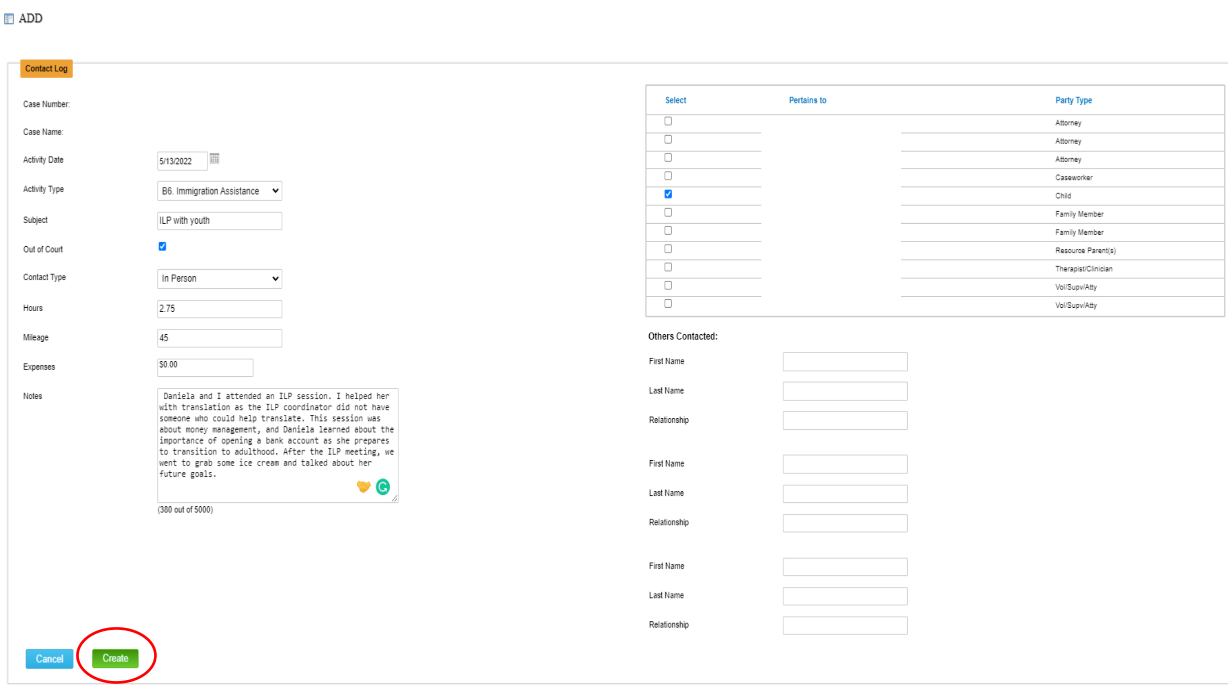
Name	Type	Subject	Date	Hours	Status	Action
	B6. Immigration Assistance		5/13/2022	2.75	Pending	
	02-Attended Case-related Meeting(CFT, Probation...)		4/13/2022	1.5	Approved	
	01-Contact with Interested Party (PO,SW,Parent...)		3/28/2022	1	Approved	
	00-Contact with Child/Youth		3/28/2022	3.25	Approved	
	01-Contact with Interested Party (PO,SW,Parent...)		3/25/2022	0.5	Approved	
	00-Contact with Child/Youth		3/1/2022	0.25	Approved	
	00-Contact with Child/Youth		2/19/2022	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-Ed/Learning Advocacy (IEP, 504, 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...)		1/25/2022	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:



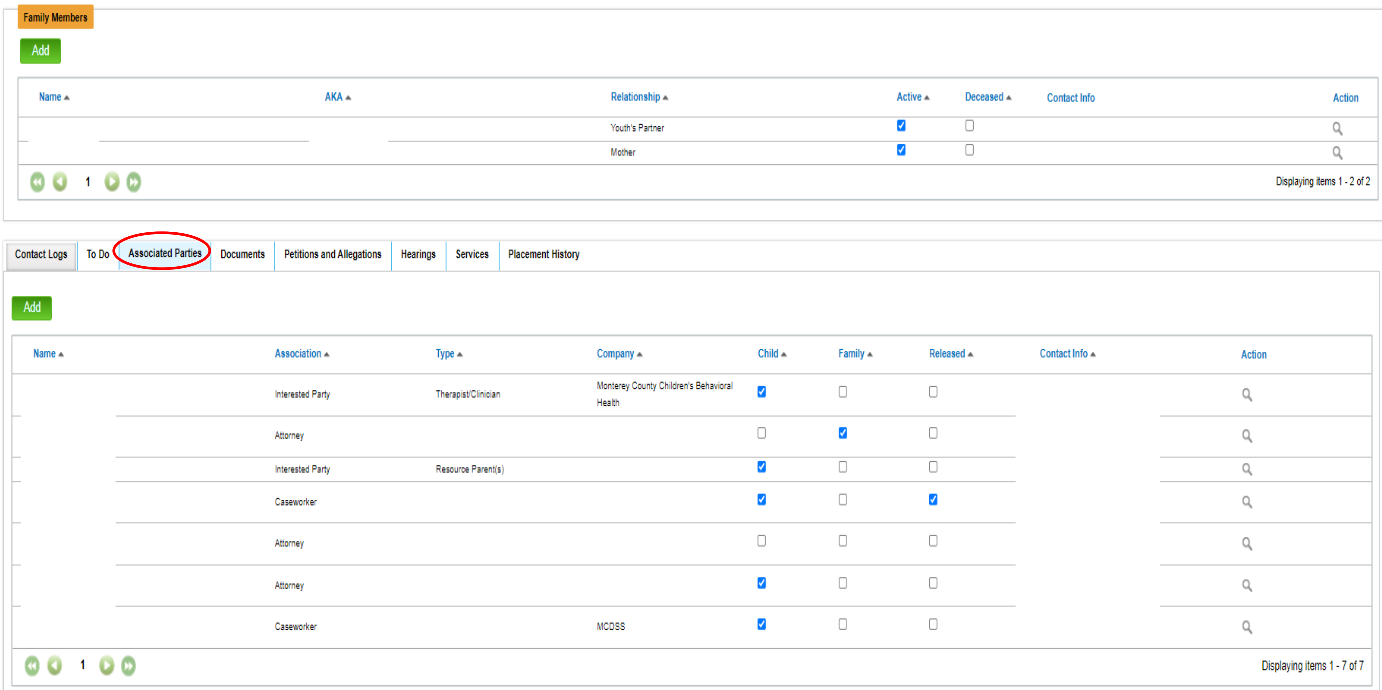
Click in the Notepad icon on the far right



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

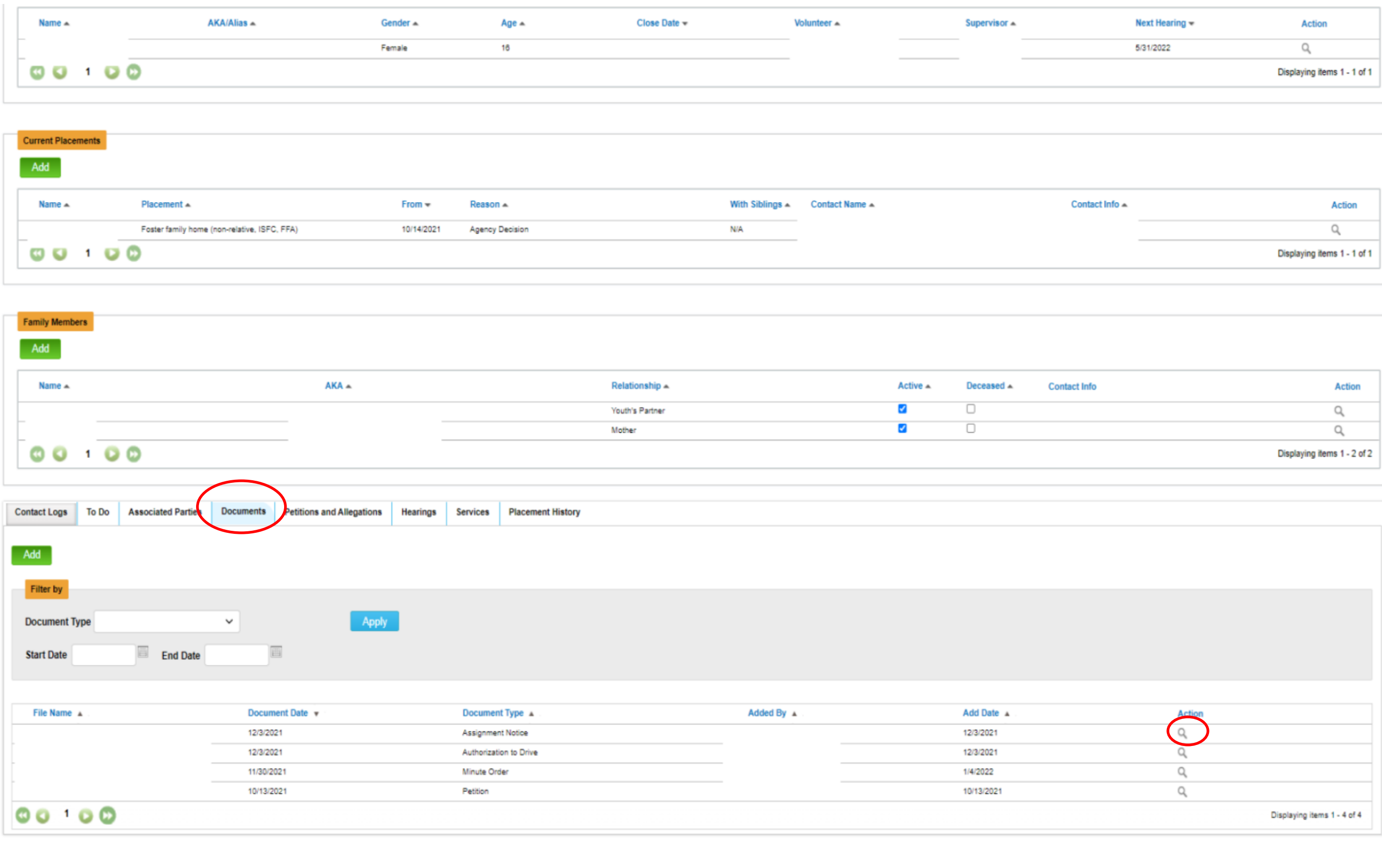
NOTE: You are not able to edit after your supervisor approves your entry!

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



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

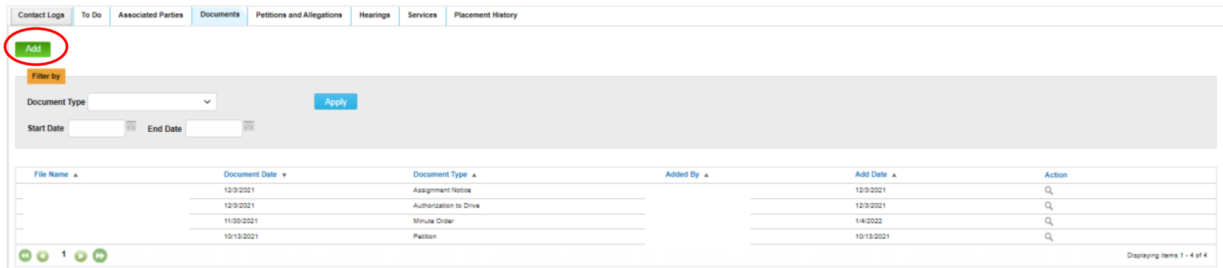
How Access Uploaded Documents



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

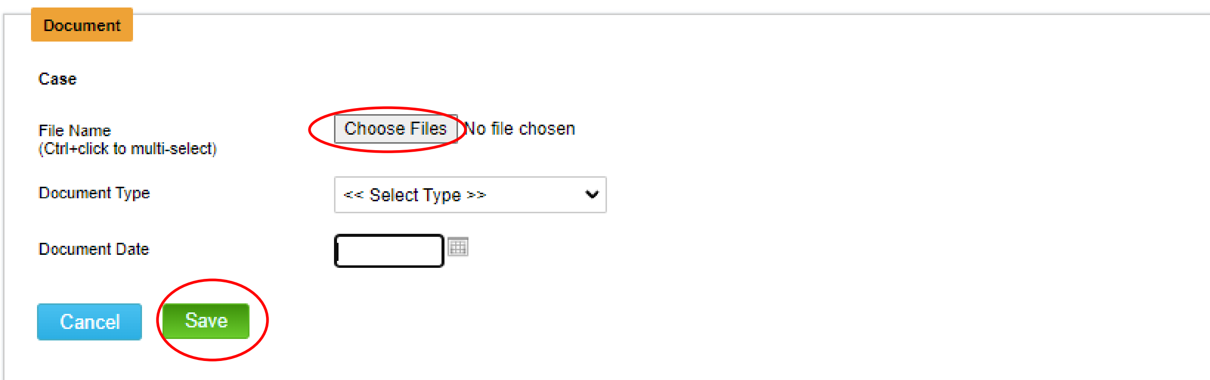
   NOTE: Remember to delete the document from your downloads folder on your computer

How To Upload a Document



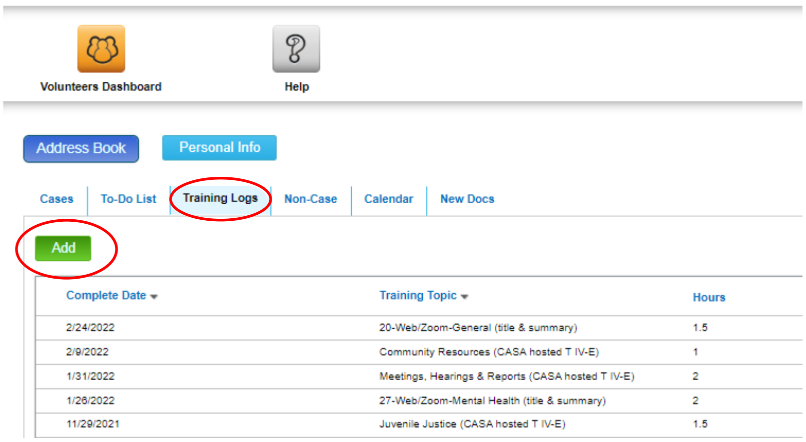
1. Click the **green ADD** button

ADD

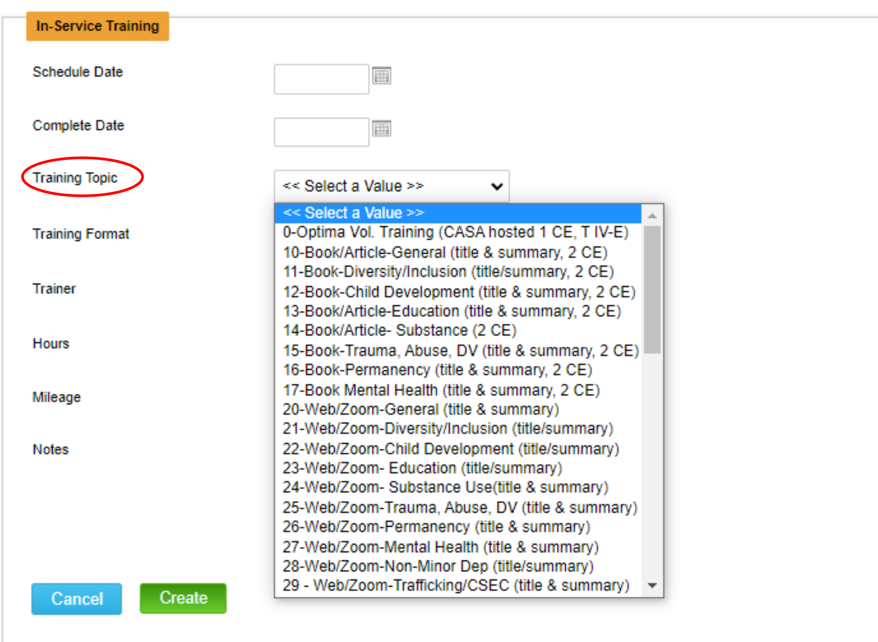


2. Click **Choose Files**
3. Enter document type
4. Enter document date
5. Click the **green SAVE** button

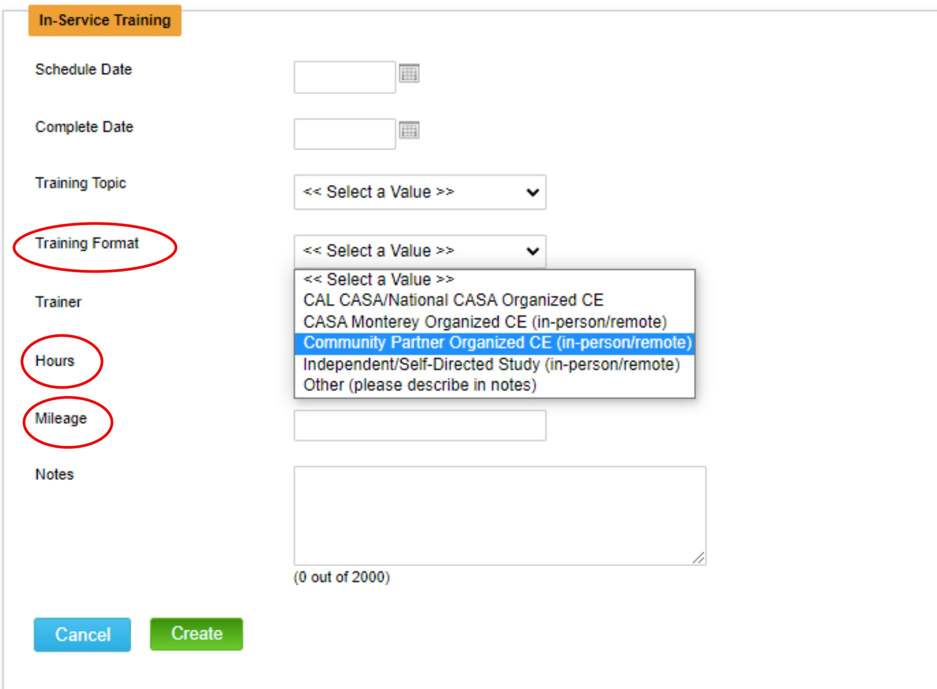
How To Input Continuing Education Hours



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

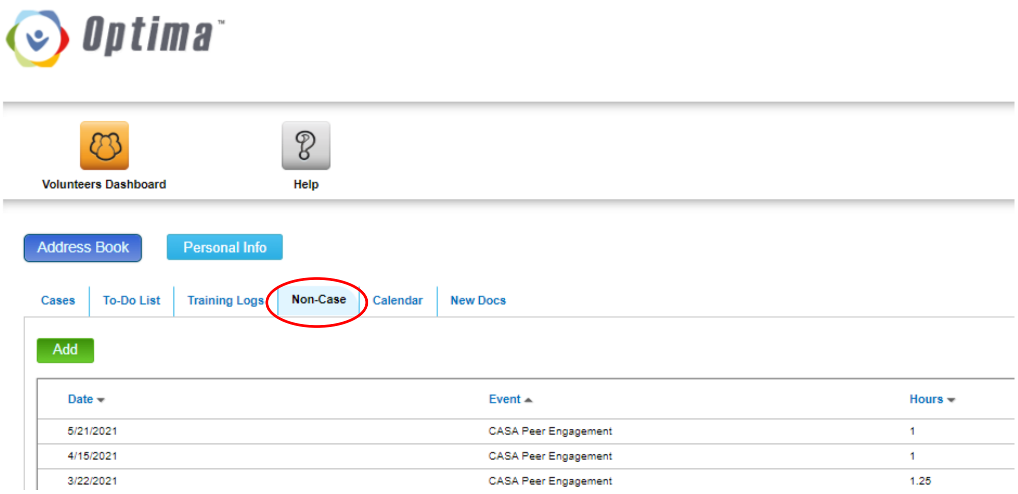


1. Enter **"Scheduled Date"** & **"Complete Date"**
   a. It is the same date, but both are required
2. Select the appropriate **"Training Topic"**

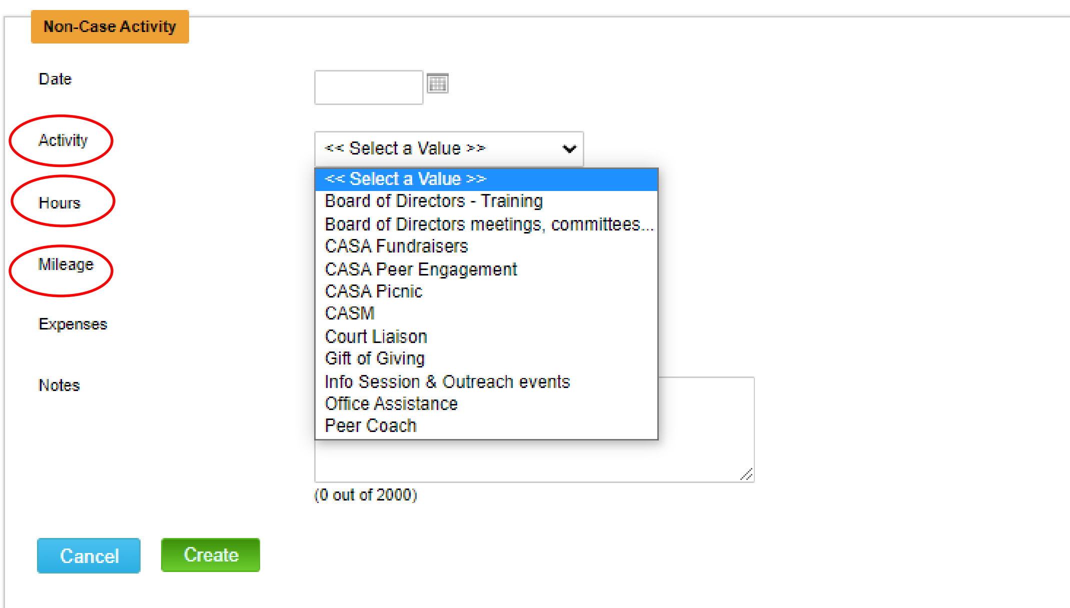


1. In **"Training Format,"** select who hosted the training
    a. If you read a book, article, or watched a movie, choose Independent Self-Directed NOTE: if you attend a training put on by CASA of Monterey, you do not need to enter it as we will do it for you!
2. Enter your hours (books = 3 hours, movie = 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



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



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