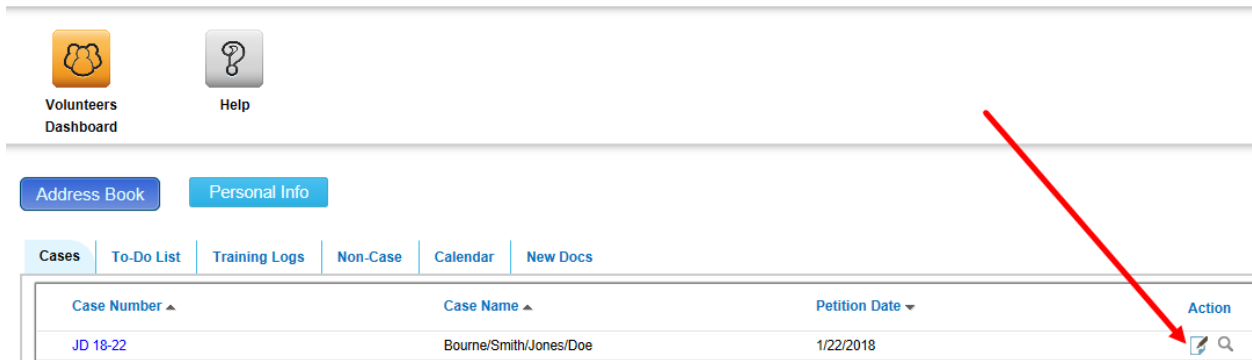


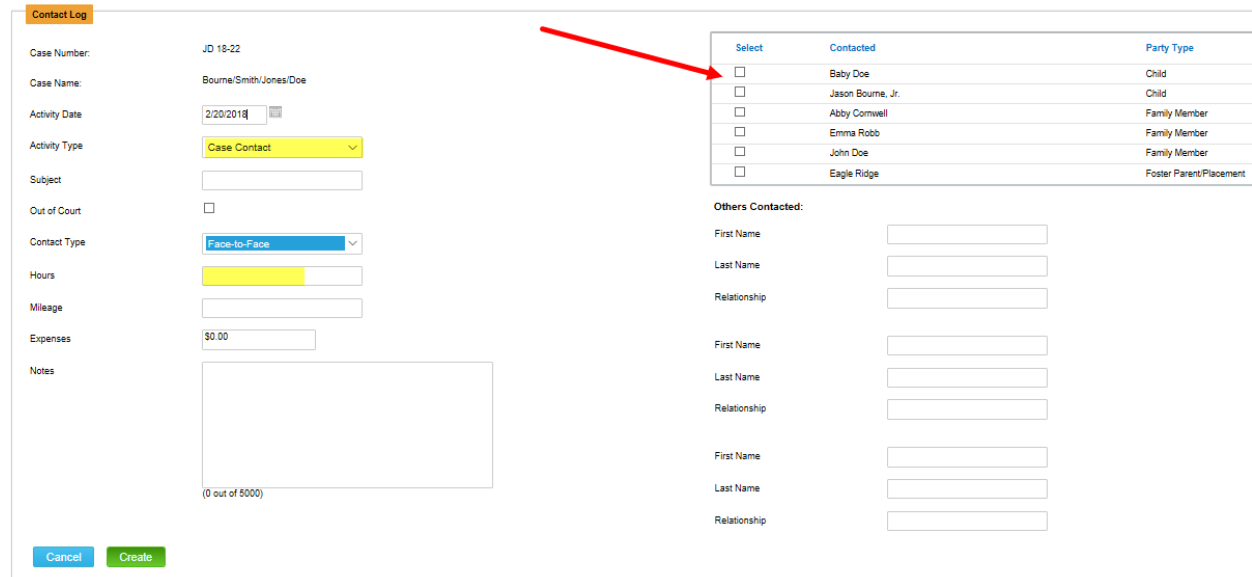
Cheat Sheet for Oklahoma State Outcomes in Optima

Volunteer Contact Logs

1. To enter a volunteer contact with hours and mileage for a volunteer who is not using Optima yet, you must log into Optima as the volunteer. The volunteer will need to be set up in User Admin first. You can leave the password as the default password of 123456.
2. From the volunteer's dashboard, you can open a new contact log by clicking on the paper and pencil in the Action column next to the case for when you are entering a contact.



3. Enter the date and for a volunteer contact, always select Case Contact in the Activity Type field. Enter the Contact Type, Hours, Mileage (if any), any Notes (if any) and check the box next to the name of the person contacted. Then click Create.



4. Optima is set up for contact logs to be entered individually as they happen. If you are trying to enter an entire month's worth of contacts, each check mark next to a name on the right side only counts as one contact. You will have to create multiple contact logs – enough to total the numbers for each contact the volunteer has for the month. You can enter the monthly hour total (and mileage if applicable) on the first contact log for that month and enter zeros on the subsequent contact logs for that month. A suggestion would be to enter the same date and subject for each Contact Log for that particular month.

5. If your volunteer will never be using Optima, you can set the volunteer's Contact Log Approval requirement to None Required in the Case Assignment section for each case to which that volunteer is assigned by clicking on the Edit button next to the volunteer's name under Case Assignments and selecting None Required instead of the supervisor's name then click Save.

ASSIGNMENT DETAILS

[Back](#)


Case Assignment

Case	Bourne/Smith/Jones/Doe - JD 18-22
Edit	
Volunteer/Supervisor	Calhoun, Liam
Case Supervisor	<input type="checkbox"/>
Assigned Date	1/22/2018
Contact Log Approval	None Required
Released Date	
Release Reason	

Facilitation Log

1. To create an entry for a service facilitated by your CASA volunteer outside of court, you will repeat steps 1 and 2 from above.

2. Instead of entering Case Contact in the Activity Type you will select the type of service your volunteer facilitated from the drop down box – e.g., Counseling, etc. Enter the date, a subject (if applicable), hours, contact type, mileage (if applicable) and a note (if applicable). You can also check the Out of Court box. Then click Create.

 ADD

Contact Log

Case Number: JD 18-22

Case Name: Bourne/Smith/Jones/Doe

Activity Date:

Activity Type:

- Case Contact
- Case Supervision
- Counseling**
- Education
- Medical
- Permanency
- Placement
- Services Child
- Services Parent
- Trauma
- Visitation

Subject:

Out of Court:

Contact Type:

Hours:

Mileage:

Expenses:

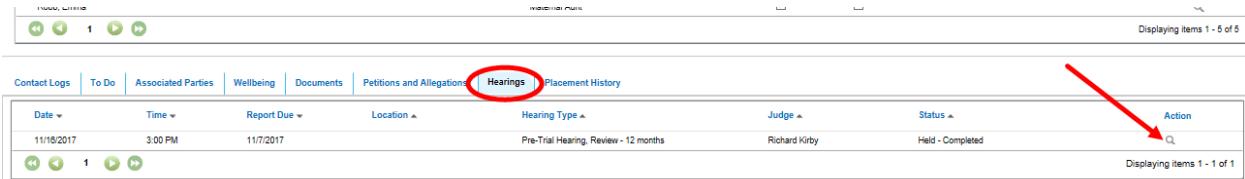
Notes:
(0 out of 5000)

3. Since this is a Facilitation Log entry, you will not do anything in the right hand column to indicate person(s) contacted.

4. Again, Optima is set up for facilitation logs to be entered individually as they happen. If you are trying to enter an entire month's worth of facilitated services, you will have to create multiple contact logs entries – enough to total the numbers for each type of facilitated service the volunteer has for the month. You can enter a zero for each log created if this is done for an entire month's worth. A suggestion would be to enter the same date and subject for each Contact Log for that particular month.

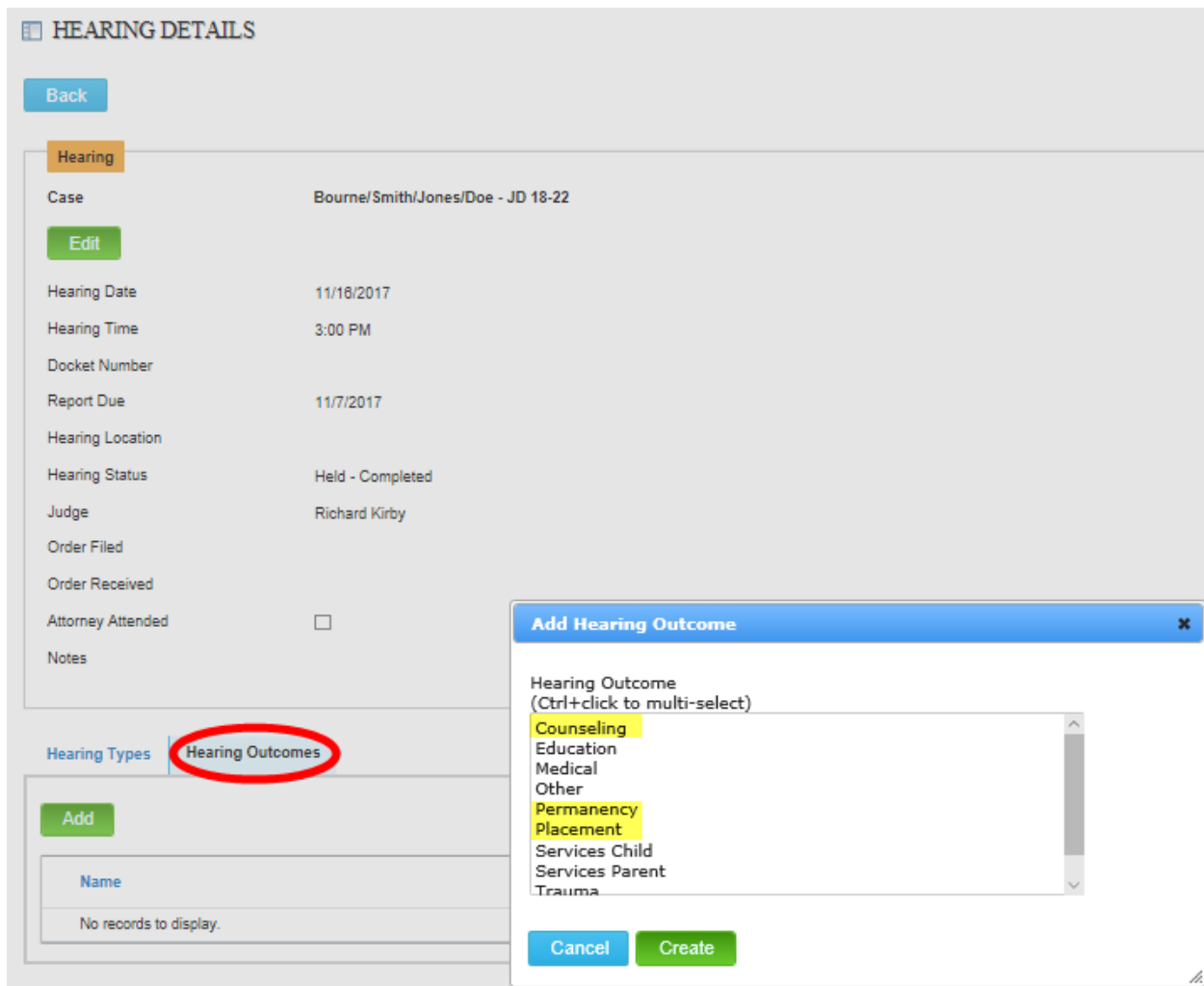
Recommendations

1. Recommendations volunteers make in court (or via court report) are entered after the hearing takes place under the Hearings tab for the specific case by clicking on the magnifying glass in the Action column next to the date of the hearing for which you are entering the recommendations.



Date	Time	Report Due	Location	Hearing Type	Judge	Status	Action
11/18/2017	3:00 PM	11/7/2017		Pre-Trial Hearing, Review - 12 months	Richard Kirby	Held - Completed	

2. Go to the Hearing Outcome section and click on Add. A popup box will appear with the different recommendation types. You can select multiple recommendation types by holding down the Ctrl key and selecting the appropriate categories.



HEARING DETAILS

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Hearing

Case: Bourne/Smith/Jones/Doe - JD 18-22

Edit

Hearing Date: 11/18/2017

Hearing Time: 3:00 PM

Docket Number:

Report Due: 11/7/2017

Hearing Location:

Hearing Status: Held - Completed

Judge: Richard Kirby

Order Filed:

Order Received:

Attorney Attended:

Notes:

Hearing Types: **Hearing Outcomes**

Add

Name

No records to display.

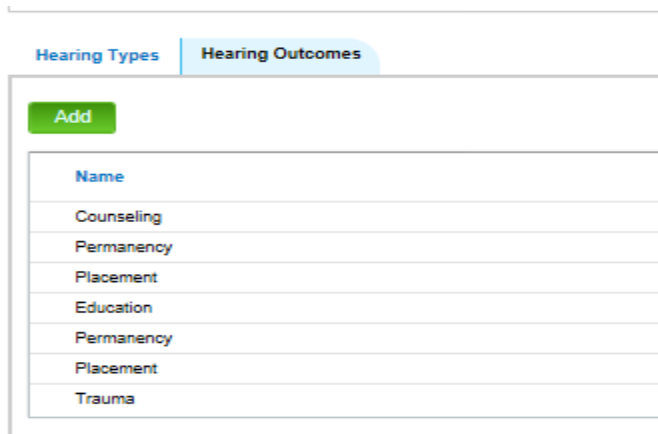
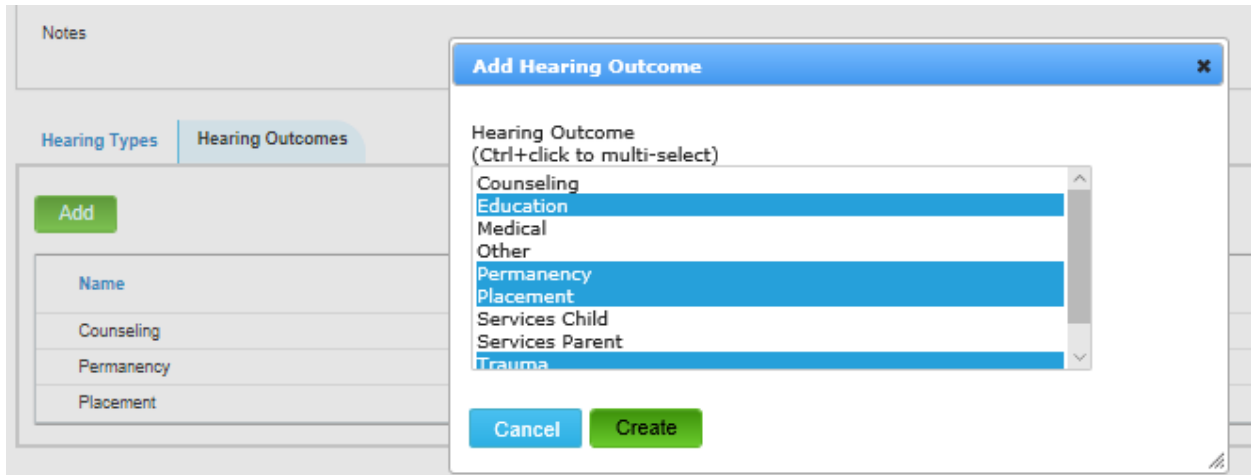
Add Hearing Outcome

Hearing Outcome (Ctrl+click to multi-select)

- Counseling
- Education
- Medical
- Other
- Permanency
- Placement
- Services Child
- Services Parent
- Trauma

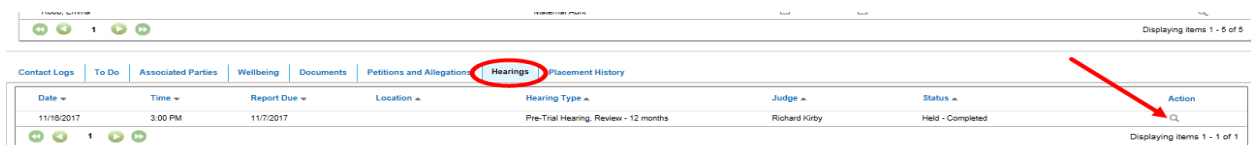
Cancel Create

3. If there is more than one child on the case, the suggestion would be to create an entry for each child and make the selections that represent the recommendations for the specific child. In this example, if I have to children, I would click on Add, select the recommendation categories made for Child 1 – Counseling, Permanency, and Placement – then click Create. For Child 2, click Add again and select the recommendations made for this specific child – Education, Permanency, Placement and Trauma – then click Create.

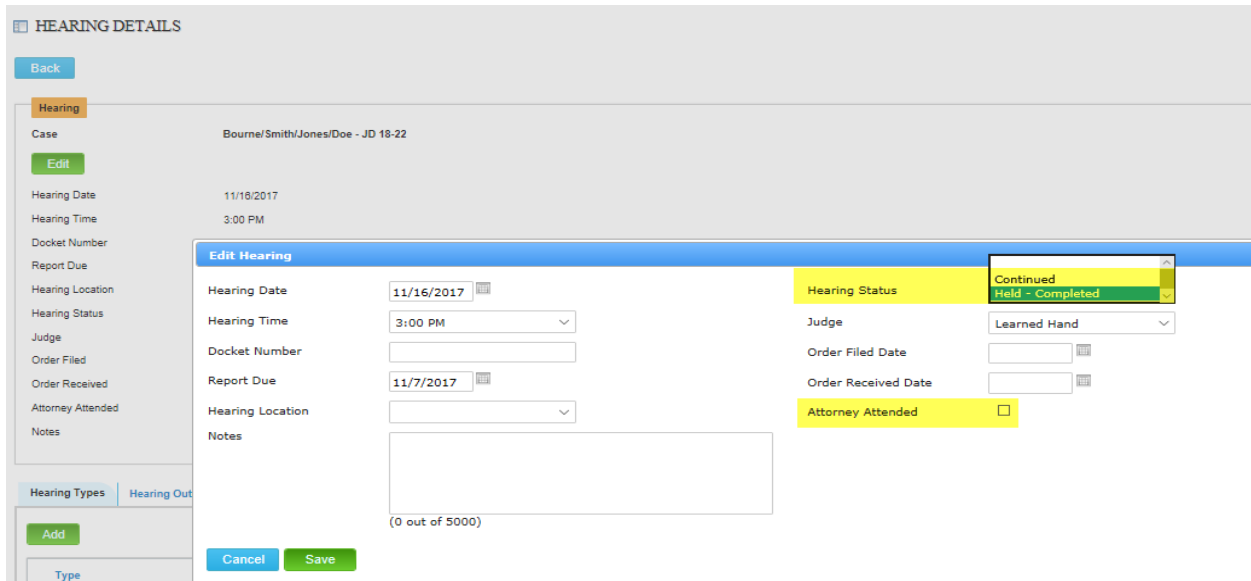


Hearing Status – Held or Continued/Child’s Attorney Attendance

1. Hearing status and child’s attorney attendance are also entered after the hearing takes place under the Hearings tab for the specific case by clicking on the magnifying glass in the Action column next to the date of the hearing for which you are entering the data.



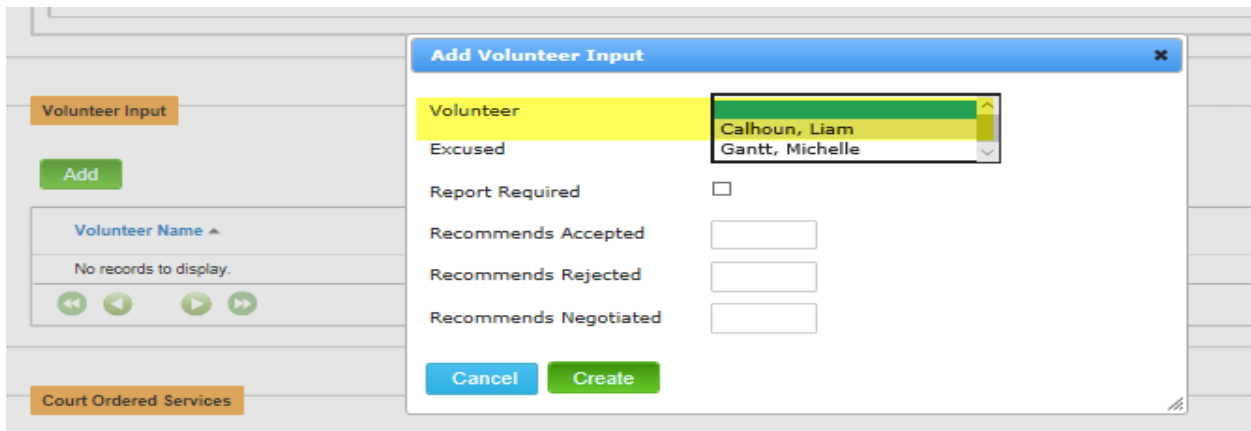
2. Click on the Edit button in the Hearing section at the top. Select the appropriate hearing status from the dropdown box – Held or Continued. If it was held, check the box next to Attorney Attendance if the child’s attorney was present then click Save.



Supervisor and CASA Volunteer Attendance

1. Again, this attendance data is also entered after the hearing takes place under the Hearings tab for the specific case by clicking on the magnifying glass in the Action column next to the date of the hearing for which you are entering the data.

2. Scroll down to the Volunteer Input section and click on Add.



3. From the Volunteer drop box, select the name of the volunteer if the volunteer was present then click Create. Repeat this step and select the supervisor’s name from the Volunteer dropdown if the Supervisor was present at the hearing and click Create again.

Changes in Professionals

1. Refer back to your notes from Module #3 on releasing professionals.
 - In the Associated Parties Tab, choose the professional you need to release by selecting the magnifying glass icon at the right of the record.
 - Choose the edit icon (paper and pencil) on the line of the child or family to whom the professional is assigned.
 - Enter the Release Date and Release Reason for the professional from each assignment as appropriate.

Associated Party







Case Bourne/Smith/Jones/Doe - JD 18-22


Edit

First Name	Jane	Company
Last Name	Brown	Title
Association	Interested Party	Bar#
Type	Assistant District Attorney	Work Phone
Address		Home Phone
Address2		Cell Phone
City		Fax
State		Work Email
ZIP		Home Email
County		Language
Notes		

Child

Add





Name	Assigned Date	Released Date	Release Reason	Action
Bourne, Jr., Jason	12/1/2016	10/24/2016		 
Bourne, Steve	12/1/2016	10/24/2016		 
Cornwell, Patricia	12/1/2016	10/24/2016		 




2. You will know you have properly released the professional from all the parties to whom he/she is assigned when there is a checkbox in the released column. If there is no check, you have missed a party or parties. Click on the magnifying glass again and look for the party for whom you didn't enter a release date.

Contact Logs | To Do | **Associated Parties** | Wellbeing | Documents | Petitions and Allegations | Hearings | Placement History | Case Closing Information

Add

Name	Association	Type	Company	Child	Family	Released	Contact Info	Action
Brown, Jane	Interested Party	Assistant District Attorney		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		 
Chase, Tiffany	Interested Party	Service Provider	Therapist	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		 



3. Click on the Add button to add the new professional (refer to your notes from Module #2, the section on adding the Associated Parties if you need a refresher).

Changing Placements

1. When changing a placement remember that Optima is people-centric. So you need to make sure the new people with whom the child/ren is/are being placed are added in either the Family Members (if a relative) or the Associated Parties (if non-relative) section first. Click on the Add button in

the appropriate section. If you need a refresher on adding Family Members or Associated Parties, refer to your Module #2 cheat sheet.

2. Once your new people are entered, go to the Current Placement section and click on the magnifying glass in the Action column next to the name of the child who is moving. Then click Edit.

3. Enter the closing date (date child moved out of this placement) in the To field then click Save.

4. Since you have already entered the new people, if necessary, under either Family Members or Associated Parties in step 1, click on the Add button under Current Placements to put in the new placement for the child. Adding New Placements are also in your notes from Module #2.