

# Optima How-To for Volunteers



## Login Info

You will attain the website link, your user name, and the default password for your program. Upon logging in for the first time, please select a case-sensitive password.

Password must contain:

- One lowercase character
- One uppercase character
- One number or special character (such as... !@#\$%^&\*(.?)
- Eight characters minimum



Welcome liam.calhoun  
Change Password | Log Off

Case Number	Case Name	Petition Date	Action
17-852	Freely/Kelson	1/3/2018	<a href="#">✎</a> <a href="#">🔍</a>
JD 2018-89	Teton/Grands/Doe	5/22/2018	<a href="#">✎</a> <a href="#">🔍</a>

Displaying items 1 - 2 of 2

- Once you log in:
  - You will be directed to the main page, also called the Volunteer’s Dashboard.
  - Click the Volunteer’s Dashboard button at any time to return to this page, but be aware what you are working on may be lost.
  - To enter your case page, select the Cases tab and then click the blue link with your Case number (or the magnifying glass in the Action column).

## Entering a Contact on a Case

Confirm that you are on the case page. It will say “CASE DETAILS” near the top. Also confirm you have the correct Case Name. (See image on next page)

CASE DETAILS

**Case Information**

Case Number	JD 2018-89
Case Name	Telson/Granda/Doe
County	Oklahoma
Jurisdiction	
Priority Case?	<input type="checkbox"/>
Petition Date	5/22/2018
Notes	Case Closed: 5/22/2018, Reason: Reunification Achieved. Case re-opened: 5/22/2018. Previous case #: 17-23-09-321

**Legal Status**

Type	Date	End Date
No records to display.		

Displaying items 0 - 0 of 0

**Case Assignments**

Name	Type	Supervisor	Assigned	Released	Reason	Contact Info
Garrt, Michelle		<input checked="" type="checkbox"/>	5/22/2018			michelle@normal.com
Calhoun, Liam		<input type="checkbox"/>	5/22/2018			
Garrt, Michelle		<input checked="" type="checkbox"/>	1/30/2018	5/22/2018		michelle@normal.com
Calhoun, Liam		<input type="checkbox"/>	1/30/2018	5/22/2018		

Displaying items 1 - 4 of 4

**Children in Case**

Name	AKA/alias	Gender	Age	Close Date	Volunteer	Supervisor	Next Hearing	Action
Granda, George		Male		5/22/2018				Q
Granda, MacKenzie		Female	5		Calhoun, Liam	Garrt, Michelle		Q
Telson, Charlotte		Female			Calhoun, Liam	Garrt, Michelle		Q
Telson, Emmaleine		Female	12	12/8/2017				Q
Telson, Noah		Male	9		Calhoun, Liam	Garrt, Michelle		Q

Scroll to the bottom of the case page, select the Contact Logs tab.

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

[Add](#) [View Notes](#) [Search](#)

Name	Type	Subject	Date	Hours	Status	Action
Calhoun, Liam	Case Contact	Phone call to parents	6/11/2019	0.25	Approved	Q
Calhoun, Liam	Case Contact	Visit with children	4/12/2019	2.75	Approved	Q
Calhoun, Liam	Case Contact	Email to DHS	3/18/2019	0.5	Approved	Q
Calhoun, Liam	Case Contact	contact with child	1/30/2019	1.25	Approved	Q
Calhoun, Liam	Case Contact	contact with child	1/30/2019	1.25	Approved	Q
Calhoun, Liam	Case Contact	contact with child	1/30/2019	1.25	Approved	Q
Calhoun, Liam	Case Contact	education	3/7/2018	1.25	Approved	Q
Calhoun, Liam	Case Contact	Education	2/10/2018	0.25	Approved	Q

Then:

**1. Select the green “Add” button.** (This will open a new window.)

**2. Enter the Date of the contact.**

**3. Select the Activity Type for the contact.**

Case Contact – This is the one you will select on a regular basis.

Case Supervision – This selection is for use by your Advocate Supervisor only. Do not select.

VOCA Packet – Only use this selection when instructed by your supervisor.

**4. Enter a Subject with a brief summary (2-3 words) about the contact.** *Example: Text – Foster Mom*

**5. Tick the “Out of Court” button for all contacts that occur outside of a hearing.**

**6. Enter the Contact Type for the contact.**

Attempted contact (no answer, no voicemail set up)  
Email  
Face-to-Face (physically present with the individual)  
Letter or written documentation  
Phone  
Non-Contact hours (research, writing report)  
Text  
Video Conference (facetime, zoom, etc)  
Voicemail

**7. Enter the Hours\* spent on the activity.**

(Hours should include travel time. Please round to the nearest quarter hour)

For 15 minutes, enter .25 (hours)  
For 30 minutes, enter .50 (hours)  
For 45 minutes, enter .75 (hours)  
For 1 hour, enter 1 (hours), etc.

**8. Enter Mileage and Expenses, as needed. (if applicable to your program)**

**9. Check the boxes of people who were directly contacted.**

On the right side of the page is a box labeled "Pertains To." Select only the parties that you had successful contact with for this entry. If the person you contacted does not appear in the box, determine if you will have ongoing or additional contact with them. This will mean they are a party to the case. If not, use the "Others Contacted" section for this contact. If you will be contacting the individual again, stop and notify your supervisor. They will enter the party in Optima for you, then you can return and enter your contact.

**10. Enter Notes about the contact.**

This Notes sections is for your summary of the contact and any important case information you learned during the contact. Think of this area as your official notes for your case. These notes can be subpoenaed for trial so please include the facts you learn and details about the contact you want to remember. Do not include statements of opinion.

**11. Select "Create."**

You will then be redirected back to the main page of the contact log. You should be able to see your contact appear and it will be listed as "Pending." While the contact is still pending, you can go back in and either make changes, or delete the contact. After your Supervisor has read your contact, they will mark it as "Approved." In some cases your supervisor may ask you to enter more information or edit your contact in some way.

\*A note about hours: Occasionally you may have an ongoing conversation via text or email with an individual on your case. These do not need to be separated into individual logs. Select the date the contact began and in the Notes make it clear the conversation happened over time. *Example: Series of texts with foster parent May 15 – May 18; determining an agreeable date for my next visit. Decided on May 31<sup>st</sup> at 9:30am at Greer Park.*

## Case Documents

Confirm that you are on the case page. It will say “CASE DETAILS” near the top. Also confirm you have the correct Case Name.

**CASE DETAILS**

**Case Information**

Case Number: JD 2018-89  
 Case Name: Teton/Grands/Doe  
 County: Oklahoma  
 Jurisdiction:  
 Priority Case?:   
 Petition Date: 5/22/2018  
 Notes: Case Closed: 5/22/2018, Reason: Reunification Achieved.  
 Case re-opened: 5/22/2018.  
 Previous case #s: 17-23 09-321

**Legal Status**

Type	Date	End Date
No records to display.		
Displaying items 0 - 0 of 0		

**Case Assignments**

Name	Type	Supervisor	Assigned	Released	Reason	Contact Info
Gant, Michelle		<input checked="" type="checkbox"/>	5/22/2018			michelle@nemail.com
Calhoun, Liam		<input type="checkbox"/>	5/22/2018			
Gant, Michelle		<input checked="" type="checkbox"/>	1/3/2018	5/22/2018		michelle@nemail.com
Calhoun, Liam		<input type="checkbox"/>	1/3/2018	5/22/2018		

Displaying items 1 - 4 of 4

**Children in Case**

Name	AKA/IRAs	Gender	Age	Close Date	Volunteer	Supervisor	Next Hearing	Action
Grands, George		Male		5/22/2018				🔍
Grands, MacKenzie		Female	5		Calhoun, Liam	Gant, Michelle		🔍
Teton, Charlotte		Female			Calhoun, Liam	Gant, Michelle		🔍
Teton, Emmaline		Female	12	12/8/2017				🔍
Teton, Noah		Male	9		Calhoun, Liam	Gant, Michelle		🔍

Scroll to the bottom of the Case Details page, and select the Documents Tab.

[Contact Logs](#)
[To Do](#)
[Associated Parties](#)
[Wellbeing](#)
[Documents](#)
[Petitions and Allegations](#)
[Hearings](#)
[Services](#)
[Placement History](#)

**Add**

**Filter by**

Document Type:  **Apply**

Start Date:  End Date:

File Name	Document Date	Document Type	Added By	Add Date	Action
CMgr VOCA report.pdf	2/6/2018	Individualized Family Service Plan		2/12/2018	🔍

Displaying items 1 - 1 of 1

To **view** case documents, click the magnifying glass in the Action column next to the appropriate file name. If you are using a computer, this will begin a download of the document for you to view. If you are accessing Optima through a cell phone or tablet, clicking the magnifying glass will make the document appear on your screen. To return to the Case Details page, click the back button.

To **upload** case documents you will need to access Optima from a computer (not a cell phone or a tablet).\*

- 1. Select the green “Add” button. This will open a new window.**
- 2. Click the “Choose Files” button and select the appropriate file from your drive.**
- 3. Select the appropriate Document type. If you are not certain, please select Case File (or contact your Supervisor)**
- 4. Enter the date that appears on the document. If not date appears, use today’s date.**
- 5. Click the green save button.**

\*If you make an error while uploading a document, simply let your Supervisor know. They can edit and make changes for you. Supervisors will also likely be uploading documents for you to view. All case documents appear in this tab.