

OPTIMA POCKETBOOK



CASA JEFFERSON MISSION

To break the cycle of child abuse and neglect through volunteers advocating for safe, nurturing, and permanent homes for foster children in our community.



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: This public document was published at a total cost of \$123.75 copies were printed. :

: This document was published for CASA Jefferson, 4401 N I-10 Service Rd. West, Suite :

: #200, Metairie, Louisiana 70006 to train potential volunteer advocates under the :

: authority of a special exception by the Division of Administration. This material was :

: printed in accordance with the standards for printing by state agencies established :

: pursuant to R.S. 43:31. Printing of this material was purchased in accordance with :

: the provision of Title 43 of the Louisiana Revised Statutes. :

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Table of Contents

Quick Start Guide	1
Change or Reset Password	
Update My Personal Information	
Main User Guide	2
Address Book	
Calendar	
Training Logs	3
Case Details	4-5
Add Family Member	5
Contact Logs	6-7
Sample Contact Logs	8-11
Add A Document(Court Report)	12
Help	13

WHAT IS OPTIMA?

OPTIMA from Evinto Solutions is a web-based software suite designed by CASA professionals exclusively for CASA programs. OPTIMA is designed to be configured specifically for your program. Access it anytime, anywhere from your PC, laptop, tablet or smartphone. Using secure Internet protocols, there is no software installation or maintenance for you to manage. Connect and go! From providing easy on-the-go access to contact notes, court reports and case documents, to tracking volunteer mileage, training and case outcomes, OPTIMA takes care of everyday tasks so you can focus on the big issues.

QUICK START GUIDE

LOG ON

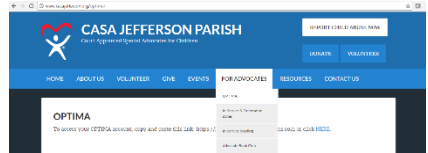
Website: <https://www.la-jefferson.evintosolutions.com>

Or

Website: www.casajefferson.org

Under “For Advocates” Tab

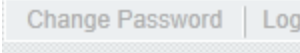
-OPTIMA



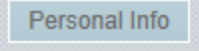
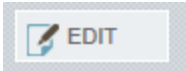
Username: firstname.lastname

Password: 123456

CHANGE OR RESET PASSWORD

- Click **Change Password** icon 
 - Complete all necessary fields (current password and new password)
 - Please note—passwords are case sensitive and must be at least 6 characters in length
- To **Reset Password** email: optimahelp@casajefferson.org
 - New password will be sent to your email

UPDATE MY PERSONAL INFORMATION

- Click **Personal Info** icon 
 - Click **Edit** Icon  to update personal information
 - Update all necessary fields and click **Save** icon

MAIN USER GUIDE

ADDRESS BOOK

Address Book






→ Great place to store contact information for resources. It cannot be edited or deleted by anyone other than yourself.

- Click **Address Book** icon
 - Click **Create New** icon
 - Complete all desired fields and click **Create** icon

CALENDAR

Calendar

→ Great organization tool; again specific to you with the availability for your Advocate Supervisor to add events.

- Click **Calendar** icon
 - Can view Day/Week/Month by selecting desired icon
 - Use arrow icons   to navigate from day to day, week to week, or month to month
- To Create a New Event
 - Double Click on desired date
 - Complete all desired fields (**Event Description, Time Period, Notes**, if you have multiple cases you can select a case number)
 - Click  **Save** icon
 - To **Cancel** click  **Cancel** icon
- To Delete an Event
 - Double click on date of event
 - Click **Delete**  **Delete** icon

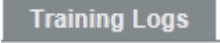
TRAINING LOGS

→ Advocate is responsible for 12 hours of Continuing Education per year

****All In-Service Trainings and clinics hosted by CASA Jefferson will be add by Program Staff**

******Advocate is responsible for entering any trainings completed outside of CASA (i.e. webinars, books or articles read, other trainings)**


How to enter Training Log?

- Click **Training Logs** icon 
- Select **Create New** icon and complete necessary fields (scheduled date, format, mileage, etc.)
 - **Training Topic:** If not instructed by staff please use your best judgment
 - **Notes:** Provide a concise summary to address questions listed:
 - Basic details of the event or material: who, what, where, when, why?
 - What did you learn from this experience?
 - How will this experience improve your abilities as a CASA Volunteer?
 - Do you have any suggestions that would make the In-Service experience more beneficial?
 - Would you recommend this In-Service event/experience for other CASAs?




Don't forget to hit "create" when you finish!

CASE DETAILS

→ This takes the place of all paper case documents/files

- Click  magnifying glass icon and CASE DETAILS section will appear
 - **Case information:** basic case details
 - **Legal Status:** child/will be blank
 - **CASA Assignments:** CASA staff and volunteer Advocates assigned
 - **Children in Case:** Children information
 - **Current Placements:** Caregiver information
 - **Family Members:** all family members even if deceased; if multiple fathers on case AKA section will display what child/father is connected
 - **Contact Logs:** takes the place of monthly activity forms. See Contact Logs on page 6
 - **Associated Parties:** all parties involved other than CASA and family members. Examples include attorneys, caseworkers, foster parents, doctors. See Associated Parties on page 8 to add new parties.
 - **Documents:** all scanned documents relating to the case such as court petitions, FTC packets, DCFS reports, CASA court reports, etc.

Save documents under a name you will recognize and do not keep files on computer.

- Click  magnifying glass icon to view document
- Click **Open** icon and the document will open with Adobe Reader
- To turn document click **View** icon, select **Rotate View** icon, and click **Clockwise** icon
- To zoom in click 
- To zoom out click 

- To close document click



- **Petitions and Allegations:** date child/children were placed in foster care

Hearings: dates for upcoming court hearings; will display date CASA court report is due

Placement History: placement information on all children since being placed in foster care

*Less time
doing
paperwork =
more time to
advocate.*

ADD FAMILY MEMBERS

- To add a Family Member click **Add** icon
 - Fill in as much information as possible
 - Click **Save** icon

PLEASE MAKE SURE ALL INFORMATION IS CORRECT!

Send email to optimahelp@casajefferson.org if changes are needed, with correct information.

ABILITY

IS WHAT YOU'RE CAPABLE OF DOING

MOTIVATION

DETERMINES WHAT YOU DO

ATTITUDE

DETERMINES HOW WELL YOU DO IT


CONTACT LOGS

→ This takes the place of monthly log forms. All contacts to be entered within 72 hours of contact

- If in CASE DETAILS click **Contact Logs** icon and click **Add** icon

Name	Type	Subject	Date	Hours	Status	Action
No records to display.						

- If in VOLUNTEER DASHBOARD home page click pen/paper icon  in **Action**

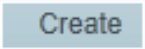
Case Number	Petition Date	Case Name	Action
13-CC-84	9/24/2013	Harrington	

- Complete all necessary fields
 - **Date Activity Occurred**
(NOT date entered)
 - **Activity Type** (Use drop box)
 - **Subject** (Home Visit, Check In, Court Hearing)
 - **Out of Court** (check box for non-court related contact)
 - **Contact Type** (Face to Face, Phone, Email, Text, etc.)
 - **Hours:** (not minutes)
.25=15 min., .50= 30 min.
.75= 45 min., 1 hr., 1.25= 1 hr. 15 min., etc.
 - **Mileage:** roundtrip

NOTE:

Anytime you contact/meet with collaterals and their name is not in check box, please type in the “Others Contacted” section

Make separate paragraphs for each child. Ex. Visited three children today at the foster home = write at least three separate paragraphs

- **Notes:** Make Sure all information learned; observations of interactions, well-being of child, condition of home,..is included. ****Don't' forget to write notes about the child**** Be as detailed as possible.
 - Select all parties present (if not listed then type in necessary fields under **Others Contacted**)
 - Click  to save contact log
-
- Once **Contact Log** has been submitted the status will be pending and upon the coordinator's review the status will change to denied or approved
 - **Denied Status:** Please open and review log for coordinator's suggestions. Once corrections have been made click Save icon
 - **Approved Status:** Contact has been approved and you can no longer edit the log. Please contact coordinator if corrections need to be made
 - View old notes and search through notes as needed (helpful if assigned to an existing case)
 - **ALL** contact logs are due by 25th of every month

**BE THE CHANGE
YOU WANT TO
SEE IN THE
WORLD**

SAMPLE CONTACT LOGS

Case Number: C2017CC52

Case Name: CASA

Date: 5/18/2017 **Activity Type:** Contact with Associated Parties

Contact Type: Text **Subject:** Change in Placement

Notes: Mrs. Sally sent me a text message at 12:19am to let me know that RB would be going to his new foster home on 5/20. She wanted to express her sadness and didn't know who to share her feelings with. I messaged back 45 mins later and let her know that I would check in with her around lunch time the next day.

Date: 3/19/2017 **Activity Type:** Contact with CASA Supervisor

Contact Type: Face to Face **Subject:** Monthly Supervision

Notes: AC and I discussed home visit and how well Emily is doing. Discussed Maria's concerns regarding Erin visiting PH in jail and asking him to sign over parental rights. AC stated this is normal and actually more beneficial for him to do rather than if his rights are terminated because if another one of his children come into the system, his rights will be terminated and he will not be given the opportunity to work a case plan. Caretakers are not to discuss this with him as this is to be his decision. AC and I discussed Maria and Henry's obvious stress due to the fact PH has not completed case plan and is still incarcerated and can't seem to get his act together. I told AC I noticed hesitancy answering me when I asked if they are still willing to adopt and AC stated it is probably due to the stress of the situation and the fact Erin had just left and they were upset with discussion they had about Phillip. We discussed Emily's 18 mo checkup, upcoming cruise 6/19, how big she is for age and visit she had with previous caretakers. Discussed how fortunate Emily is to have family that can adopt her but previous caretaker's willing if they are not.

Date: 4/16/2017

Activity Type: Child Contacted

Contact Type: Face to Face

Subject: Home Visit

Notes: Arrived at 6:45 p.m. and Erin had just left. Erin brought Lifebook which was white binder with pages but no entries. I told Maria and Henry they could put life experiences as well as photos in the book but they did not seem too enthused about it. Henry met me at door with Emily and Maria was busy at kitchen table on phone I thought texting. She appeared a little stressed and busy and asked me to sit down which I did. Henry went into kitchen and I asked how everything is going and they both looked at either and rolled their eyes. Maria, while still on phone, said "we heard Erin went to see my brother in jail yesterday and asked him to sign something to terminate his parental rights". I asked if they knew when he would be getting released and Maria said his court date keeps getting pushed back. Maria said her brother was very upset and they asked Erin about this and she told them she went to visit him to discuss how he has not completed case plan and this will be the normal course of action as the one year deadline approaches. Maria was still on two phones and appeared to be texting someone and then told me she was making final payment on cruise which they and family are excited Emily will be able to go on. I asked if PH will be joining them and she said no way. She again stated "they keep pushing back his court date". They are going on cruise 6/19 and I told her I would be following up to make certain they have original birth certificate two weeks prior. I did remind them that goal is reunification and asked if Emily has seen her father and is maintaining a bond. They did not answer. I asked if his rights are terminated as well as Ms. Batiste, are they still willing to adopt and they replied yes, but not as adamantly or enthusiastically as they have in the past. I felt some hesitation on their part but probably due to the reality of the situation. Maria is still very protective and defensive of her brother saying how anxious and nervous he is being locked up. I asked how Emily's 18 month checkup went and she said fine and doctor did receive immunization records. I asked how visit with Betsy's went and she said "good". Emily was a little hesitant at first but warmed up when offered chicken (they

went to Raising Canes). Maria repeated several times Mrs. Betsy stated she could tell Emily has formed bond with both she and Jeffery. Emily did not come to me as readily as last visit but did come to me and called me mama and Marissa said she is calling everyone mama. Maria stated Emily is also saying "no" to everything and Maria seemed to be a little less patient with her while she was running around. I asked if Emily is seeing her brother Josh and she said yes that Emily loves her brother. I also asked if Emily has seen her new little sister, Chloe, and they both hesitated answering me and said they think so at DCFS visit. I have seen on social media Ms. Batiste posts of photos of Emily and Zoe together on a Sunday 3/26. I did not mention this to them. One thing I have consistently noticed is there are no photos of anyone anywhere. There were none on first visit and still are none anywhere visible.

Date: 4/20/2017

Activity Type: Child Contacted

Contact Type: Face to Face

Subject: Attended Court Hearing

Notes: I met with Misty today. She was very excited she did not want to see her sister at first. We talked about not having attitudes and she was very interested in what the judge had to say about her visiting with her Aunt after court. She stated that her Sister was upset because Jovia said that she reported her sister's Fiancé pays attention to her and she stated she did not say that. Her sister does not want her Fiancé to experience any harm from her. Testified in court as to the things r: Misty out of control behavior and the inability to calm down at psychiatrist office, effects of sudden decrease in child meds., possibly Jovia being the triggers for Misty and her safety maybe at risk with Misty. I agree with recommended placement. Child apologizes to Jovia and now wants her to remain her worker. Jovia wants to remain and feels she can work with Misty. Court on 4/18 regarding placement update since DCFS was exploring a PCP Facility and waiting response.

Date: 5/22/17 **Activity Type:** Contact with Associated Parties

Contact Type: Phone **Subject:** Call from Parent's Attorney

Notes: Ayanna gave Lisa my phone number. Lisa Harrell called Saturday with concerns that she called Ms. Doris. Ms. Doris said that Ms. Harold did not visit Josh during scheduled DCFS visits so if she adopted Josh that she did not understand why Ms. Harold should have visits. I did not give any info-just listened.

*T*ell me and I forget
*T*each me and I remember
*I*nvolve me and I learn.

- Benjamin Franklin

ADD A DOCUMENT

Advocate should use OPTIMA to submit confidential records. This may include court reports, medical records, school records etc.

Advocates should send their confidential court reports to their assigned advocate coordinator for review. How do you send your report? You simply upload it into OPTIMA as a draft first and then as a final copy.

Optima is an encrypted site and for the privacy of our children and families, it is important that we keep their information secure.

How to Upload a Document?

- In CASE DETAILS click Documents tab



- Click on the Add icon and upload the document.
- Document Date will be the date on the document

Don't Forget to Save Save

HELP

- *Internal help: email optimahelp@casajefferson.org*
- **No internet access / no electronic device?**
 - *Library*
 - *CASA office*
- **Forgot password?** *See page 1*
- **Boxes turn red when trying to create/save?** *Red box means that the field cannot be left blank*

Optima does not send out alerts when something has been uploaded or updated. Please utilize your Volunteer Dashboard to see new updates.

Director of Operations

Wendy Magee

Direct line: 504-620-5891

Email: optimahelp@casajefferson.org

Training Coordinator

Wanda Smith

Direct line: 504-620-5887

Email: wsmith@casajefferson.org