OPTIMA GUIDEBOOK

2020

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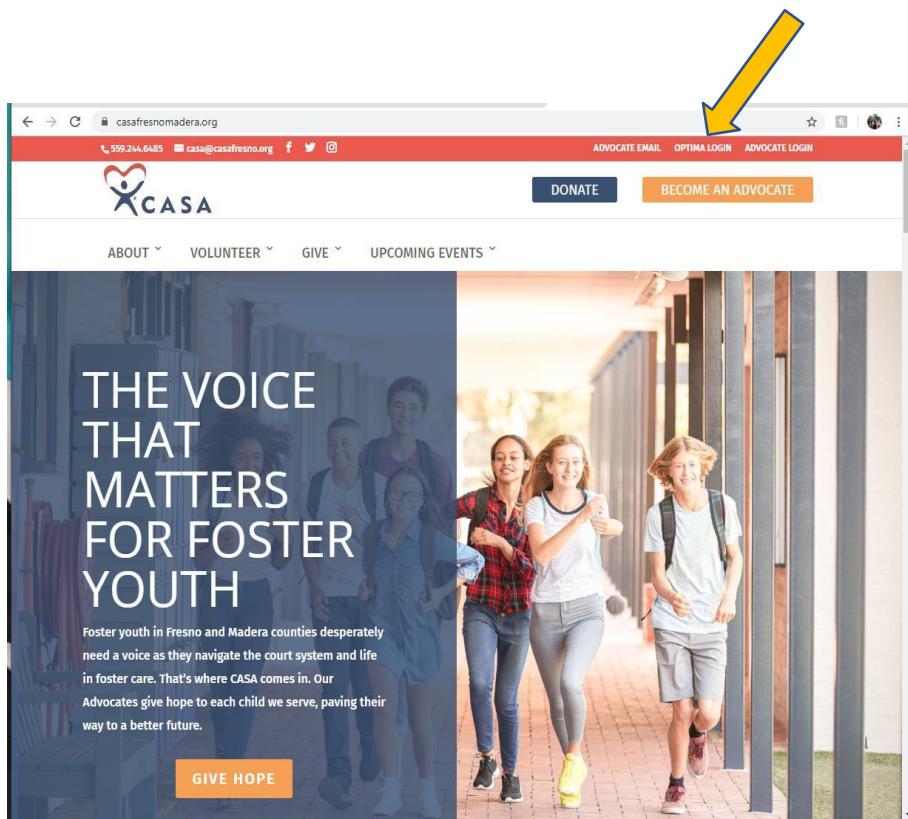
Optima

Log In

https://www.casafresnomadera.org/

*You will find the Optima link at the bottom of the Homepage

Please enter your user name and password.

User name

Password

Remember me?   Forgot password?

Log On

How enter Demographics, Emergency Contacts & Employment

Volunteers Dashboard

Help

Click on the Personal info button

Address Book   Personal Info

Cases   To-Do List   Training Logs   Non-Ca...   ...dar   New Docs

Case Number ▲	Case Name ▲	Petition Date ▾
		10/5/2017

1

*Volunteer Dashboard – Treat this like your home button

Optima™

Volunteers Dashboard   Help

Click on the Edit button to add or update Personal information

📖 DETAILS

Demographics

Edit

First Name		Gender	Female
Middle Name		Home Email	
Last Name		Work Email	
AKA		Best Email	Home
Address		Home Phone	
Address 2		Cell Phone	
City	Fresno	Work Phone	
State	CA	Best Phone	Home
Zip		Permission to Call at Work	☐
County		Permission to Share Info	☐
Hispanic	☐		
Race			
Marital Status			

*Homework – Go to your demographics and update anything that is incorrect or missing.

How to Enter Emergency Contact information

Click on the Personal info button

Optima™

Volunteers Dashboard

Address Book   Personal Info

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

Case Number ▲	Case Name ▲	Petition Date ▼	Ac
		10/5/2017	

1

To add or update Emergency Contacts Click the ADD button

Emergency Contacts

Add

First Name	Last Name	Phone	Phone 2
No records to display.			

1

First Name	Sandra	Gender	Female
Middle Name		Home Email	
Last Name		Work Email	
AKA		Best Email	Home

Add Emergency Contact

First Name		Phone 2	
Last Name		Relationship	
Phone		Email	

[Cancel] [Create]

Make sure you click on the CREATE button when finished to save all information

Address	
Address 2	
City	
State	
Zip	
County	
Hispanic	
Race	Caucasian
Marital Status	Decline to state

Emergency Contacts

[Add]

*Homework – ADD at least 1 emergency contact

How to Enter Employment Information

Click on the Personal info button

Volunteers Dashboard

Help

Address Book   Personal Info

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

Case Number ▲	Case Name ▲	Petition Date ▼
		10/5/2017

1

Click on the Edit button to add or update Employment

Employment   About

Edit

Career Type	ent/military
Employment Status	Retired
Current Employer	✔
Company	
Address	
Address2	
City	
State	
Zip	

Job Title	
Responsibilities	
Work Hours	
From Date	
To Date	
Reason For Leaving	
Supervisor First Name	
Supervisor Last Name	
Permission To Contact	☐
Phone Number	

You only need to complete the Career Type and Employment Status, everything else is Optional

Edit Employment   ✖

Career Type   [_____] ▼ ◄═══ Title   [_____]

Employment Status   [_____] ▼ ◄═══ Responsibilities [_____
                                                                   _____
Current Employer   _____]
  ☑

Company   [I_____]   Work Hours   [_____]

Address   [_____]   From Date
                                               [_____] 📅
Address2   [_____]
                                               To Date
City   [_____]   [_____] 📅

State   [_____]   Reason For Leaving   [_____]

Zip   [_____]   Supervisor First Name   [_____]

                                               Supervisor Last Name   [_____]

                                               Permission To Contact
                                                 ☐

                                               Phone Number   [_____]

[Cancel] [Save]

                                               Supervisor First Name

                                               Supervisor Last Name

*Homework – Make sure your current or most recent career is entered and/or correct.

Volunteer Dashboard

How to enter Family Members

*Make sure to add people 1st- then Placements, then start entering Contact logs

Click on the magnifying glass to view case details
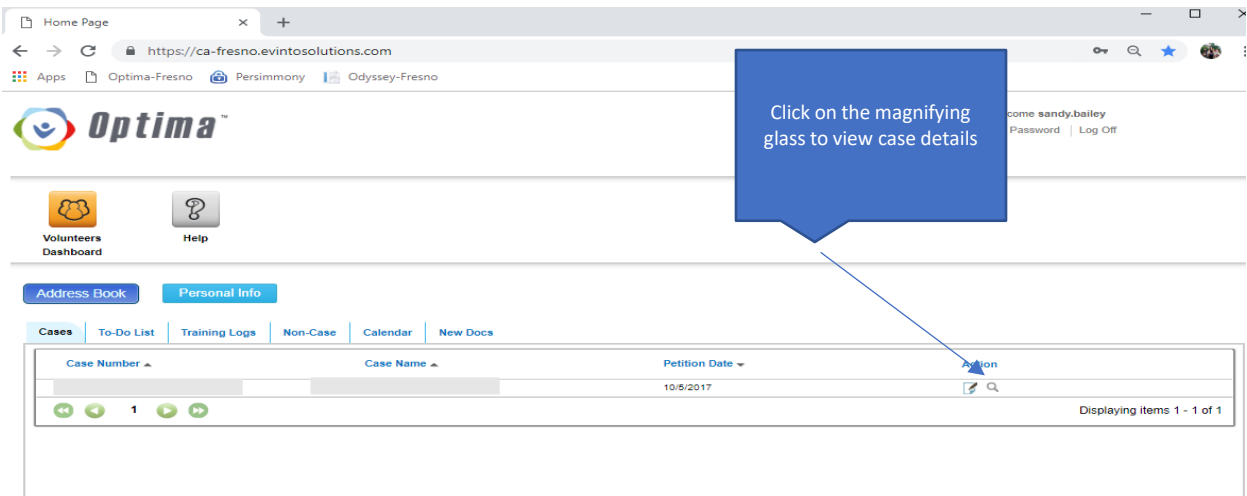
Family Members

Add

Name ▲	AKA ▲	Relationship ▲	Active ▲	Deceased ▲	Contact Info	Action
No records to display.						

Displaying items 0 - 0 of 0

Volunteers Dashboard   **Help**

ADD

Family Member

Case		Home Phone	
First Name		Cell Phone	
Middle Name		Work Phone	
Last Name		Home Email	
AKA		Work Email	
Gender	○ Male ○ Female	Education	
Hispanic	☐	Substance Abuse	☐
Race		Single Parent Home	☐
Birthdate		Deceased	☐
Incarcerated		Active	☑
Homeless		Notes	
Address Line 1			
Address Line 2		(0 out of 5000)	
City			
State			
Zip Code			
County			

Cancel   Create

10

Always select a <u>child.</u>

Click <u>ADD</u> to add the relationship to the child.

How to enter Associated Parties

Click ADD to enter new Associated parties

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

Add

Name ▲	Association ▲	Type ▲	Company ▲	Child ▲	Family ▲	Released ▲	Contact Info ▲	Action
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍

⏮ ◀ 1 ▶ ⏭

Displaying items 1 - 8 of 8

ADD TO CASE

Associated Party

Case

Party Type   ○Attorney ○Caseworker ◉Interested Party

Associated Party   << Select Associated Party >> ▼ **If not found in list** **New**

NOTE: Please be sure to check the drop down **EVERY TIME** to make sure that the attorney, caseworker, or interested party is not already on the list **PRIOR** to adding a **NEW** one.

If the Associated Party already exists in the list:

Select the name of the Associated Party and click **SAVE**

13

You will see the Associated Party along with all the information in the list shown below. The list is sorted alphabetically.

Name ▲	Association ▲	Type ▲	Company ▲	Child ▲	Family ▲	Released ▲	Contact Info ▲	Action
	Interested Party	Foster Parent(s)		☑	☐	☑		🔍
	Caseworker		Transitions	☑	☐	☐		🔍
	Interested Party	Other		☑	☐	☐		🔍
	Interested Party	Other		☑	☐	☐		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Caseworker		Transitions Foster Care	☑	☐	☑	ns...	🔍
	Caseworker		DSS	☑	☐	☐		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍
	Interested Party	CASA Tracker - Placement		☑	☐	☑		🔍

Displaying items 1 - 10 of 18

If the party does not already exist in the drop-down menu:

Click NEW to add Attorney, Caseworker, or Interested Party.

Note: You will enter all Attorneys, SW's, SWS's, Therapists, teachers, etc. in the associated party tab

Make sure to click Create to save your entry.

Once you have entered the information and clicked the create button, you will be directed back to this page. Make sure to choose the party from the drop down menu, make sure the correct party type bubble is checked and then click save. Your associated party should now appear in the associated parties tab.

Click SAVE

How to Enter Placement Information

Click **ADD** to enter the current placement of your child(ren) only after you have entered all family members and associated parties.

Current Placements

Add

Name ▲	Placement ▲	From ▼	Reason ▲	With Siblings ▲	Contact Name ▲	Contact Info ▲	Action
	Adoptive Home	1/2/2019	Notice Given	Some			🔍
	Adoptive Home	1/2/2019	Notice Given	Some			🔍
	Adoptive Home	1/2/2019	Notice Given	Some			🔍
	Birth Parent(s)	11/30/2018	Moved back with Bio Parent (s)	Some			🔍
	Birth Parent(s)	11/30/2018	Moved back with Bio Parent (s)	Some			🔍
	Relative Home	11/2/2018	Family/Kinship Connection	Some			🔍
	Relative Home	11/2/2018	Family/Kinship Connection	Some			🔍
	Relative Home	11/2/2018	Family/Kinship Connection	Some			🔍
	Foster Home - FFA	8/23/2018	Agency Decision	Some			🔍
	Foster Home - FFA	8/23/2018	Agency Decision	Some			🔍

Displaying items 1 - 10 of 10

Checkmark the children: If you have a sibling set, be sure to checkmark only the children who are living in the placement you are entering.

Children Placed

Case

☐ Select All
☐
☐
☐
☐
☐
☐
☐
☐
☐
☐
☐

Placed With (select one)

Placement Facility   <<Select a Value>> ⌄

Family Member   <<Select a Value>> ⌄

Interested Party   <<Select a Value>> ⌄

Placement Details

"From" and *"With Siblings"* field are both required in order to save your entry.

"From" refers to the date the children were placed (estimation is ok if you do not know the exact date)

"With Siblings" only refers to those siblings who were also removed.

Placement Details

Hearing

From

To

With Siblings   <<Select a Value>> ⌄

Placement Type   <<Select a Value>> ⌄

Placement Reason   <<Select a Value>> ⌄

Reasonable Distance ☐

In County ☐

Notes

(0 out of 5000)

Cancel   Create

Make sure to click the create button once you have everything entered.

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How to enter Contact Logs

| Family Members | | | | | | |

	AKA ▲		Relationship ▲		Active ▲	Deceased ▲	Contact Info

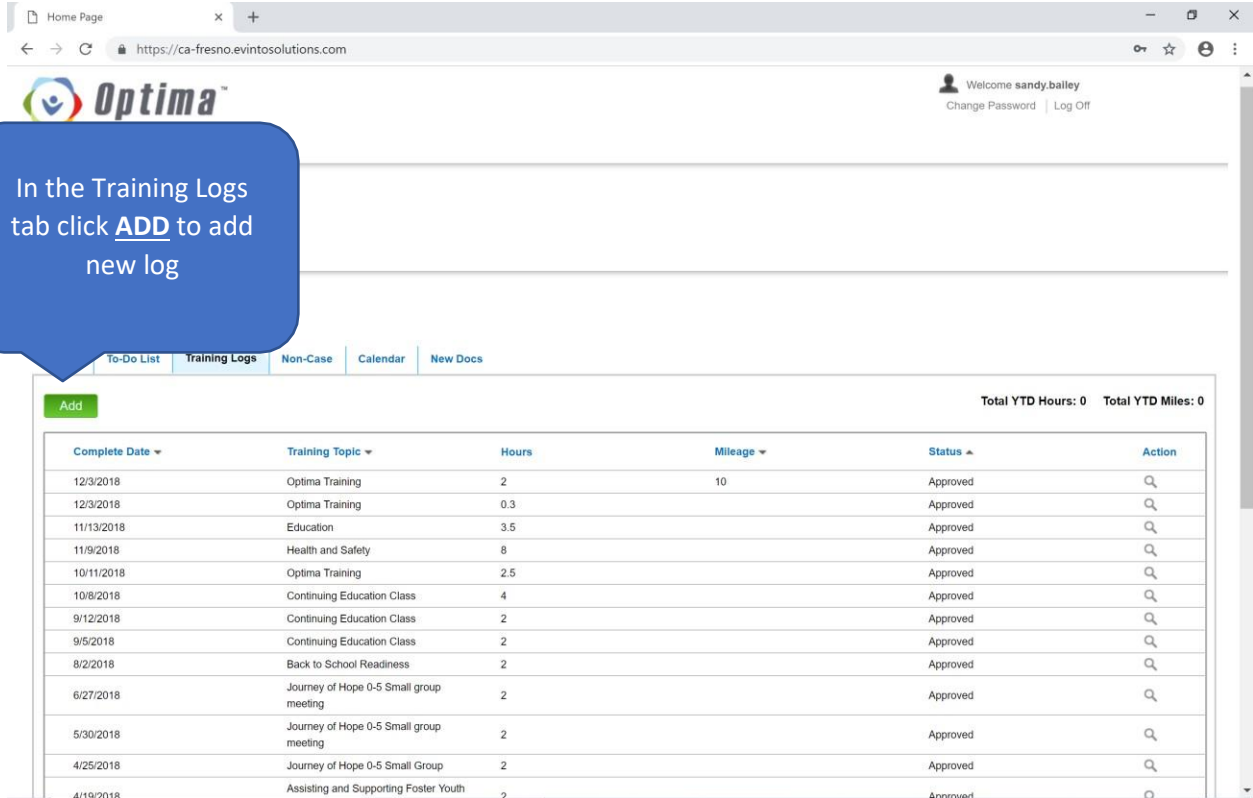In the Contact Logs tab click **ADD** to add new log

| Con... | ...o Do | Associated Parties | Documents | Petitions and Allegations | Hearings | Placement History |

Add

Name	Type	Subject	Date	Hours	Status
	Volunteer Hours		9/30/2018	44	Approved
	Volunteer Hours	Office Support	9/30/2018	70	Approved
	Home Visit		9/27/2018	0.5	Approved
	Home Visit		9/26/2018	1.25	Approved
	Home Visit		9/24/2018	1	Approved
	Home Visit		9/22/2018	1	Approved
	Home Visit		9/18/2018	1.5	Approved
	Home Visit		9/18/2018	2	Approved
	Home Visit		9/18/2018	1.5	Approved
	Home Visit		9/11/2018	1.5	Approved
	Home Visit		9/11/2018	1	Approved
	Home Visit		9/7/2018	0.5	Approved
	Home Visit		9/4/2018	1.25	Approved
	Volunteer Hours		8/31/2018	55	Approved
	Volunteer Hours		7/31/2018	44.5	Approved

◀◀ ◀ 1 ▶ ▶▶

*IMPORTANT! 1ˢᵗ- You must choose at least 1 child for every Contact log you enter.

Enter hours in 15-minute increments

Please enter as:

.25
.50
.75
1.0 & so on

**Mileage & Expenses – Only if you want to track for your own purposes

Click CREATE when done entering all information

Name	AKA ▲	Relationship ▲

No records to display.

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

Add

View No

Name	Type	Subject	Date	Hours	Status	Actio
	Volunteer Hours		9/30/2018	44	Approved	🔍
	Volunteer Hours	Office Support	9/30/2018	70	Approved	🔍
	Home Visit		9/27/2018	0.5	Approved	🔍
	Home Visit		9/26/2018	1.25	Approved	🔍
	Home Visit		9/24/2018	1	Approved	🔍
	Home Visit		9/22/2018	1	Approved	🔍
	Home Visit		9/18/2018	1.5	Approved	🔍
	Home Visit		9/18/2018	2	Approved	🔍
	Home Visit		9/18/2018	1.5	Approved	🔍
	Home Visit		9/11/2018	1.5	Approved	🔍
	Home Visit		9/11/2018	1	Approved	🔍
	Home Visit		9/7/2018	0.5	Approved	🔍
	Home Visit		9/4/2018	1.25	Approved	🔍
	Volunteer Hours		8/31/2018	55	Approved	🔍
	Volunteer Hours		7/31/2018	44.5	Approved	🔍

1

Dis

How to Enter Training Logs

In the Training Logs tab click ADD to add new log

**Books/Articles also count toward training hours. Contact your supervisor for information and approval.

Add ✕ +

← → C 🔒 https://ca-fresno.evintosolutions.com/VolunteerTraining/Create/NTIzODAyNQ%3d%3d?isFromVolunteerDashboard=True ☆ 😀 ⋮

👤 Welcome **sandy.bailey**
Change Password | Log Off

Optima™

🧑‍🤝‍🧑 **Volunteers Dashboard**   ❓ **Help**

📘 **ADD**

In-Service Training

Schedule Date		
Complete Date	1/16/2...	
Training Topic	<< Select a Value >> ▾	The Training Topic field is required.

Enter Training Topic

<< Select a Value >>
Continuing Education Class
Education
Health and Safety
Independent Living
Journey of Hope Small Group Meeting
Optima Training
Permanence
Positive Self Growth

Training Format

Trainer

Hours

Mileage

Notes

(0 out of 2000)

Click the CREATE button once you have entered all information

*Homework – Enter Optima hours.

**Optima training counts towards your 12 hours

*Documents Tab

Click the Document tab

This is where are the documents for your case will be found.

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

Add

Filter by

Document Type [   ]   Apply

Start Date [   ]   End Date [   ]

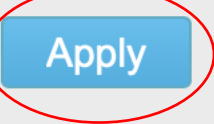| File Name ▲	Document Date ▼	Document Type ▲	Added By ▲	Add Date ▲	Action
2019.12.10 Orders after hearing.pdf	12/10/2020	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2020.12.10 Minute Order Lopez Makel, Joseph.pdf	12/10/2020	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2016-09-08 Orders after hearing Lopez Makel, Joseph.pdf	5/19/2020	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2020.05.19 Addendum Report Lopez Makel, Joseph.pdf	5/19/2020	DSS Reports	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2020.05.19 Minute Order Lopez, Makel.pdf	5/19/2020	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2020.05.19 Orders after hearing Lopez Makel, Joseph.pdf	5/19/2020	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2019.12.10 Status Review Report Lopez Makel, Joseph.pdf	12/10/2019	DSS Reports	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2019-07-02 Minute Order.pdf	7/2/2019	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2019.07.02 Minute Order Lopez Makel, Joseph.pdf	7/2/2019	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2019.07.02 Orders after hearing Lopez Makel, Joseph.pdf	7/2/2019	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2019-01-22 Post Court Hearing-Minute Order.pdf	1/22/2019	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2019.01.22 Minute Order Lopez Makel, Joseph.pdf	1/22/2019	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖
2019.01.22 Orders after hearing Lopez Makel, Joseph.pdf	1/22/2019	Minute Orders	Casados, Rosalinda	8/6/2020	✎ 🔍 ✖

*Filter By

Filter options: You can sort the time frame you'd like to view by entering the dates and clicking Apply.

Or indicate the Document Category you'd like to view and again clicking Apply.

**Indicated arrows will are to highlight Documents Categories regularly entered in Optima Documents.

Contact Logs | To Do | Associated Parties | **Documents** | Petitions and Allegations | Hea

Add

Filter by

Document Type [▼]   **Apply**

Start Date [   ] 🔲   End Date [   ] 🔲

🔲 ADD

Document

Case

File Name
(Ctrl+click to multi-select)   Choose Files No file chosen

Document Type   << Select Type >> ▼

Document Date   [   ] 🔲

Cancel   **Save**

Find the document on your computer. Indicate the Document Type from the list above. Finally, include the date the Document was filed/completed and Save.