



INDIANA CHILD ADVOCATES
Court Appointed Special Advocates
NETWORK



Optima

User Guide for Volunteers

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Overview and Acknowledgments

The **Optima User Guide for Volunteers** is for the sole usage of programs within the network of GAL/CASA in the State of Indiana. Use by unauthorized programs is strictly prohibited.

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Welcome to Optima®

Optima is an internet-based case management computer software system specifically designed and built for Indiana GAL/CASA volunteers, staff, and directors.

Within our network of programs, Optima will provide you, the volunteer, with information about your case, 24 hours a day, 7 days a week. Optima is easy to use and will save you time in keeping track of your case.

About this User Guide

This guide is intended for volunteers to use as a reference when using the Optima case management system. It contains information on how to use features and functions that are available to manage the information pertaining to assigned cases.

The first section of the guide addresses using Optima on a personal computer. The second section covers using Optima GO® for mobile devices such as a smart phone or tablet. While the look and feel of the mobile version is different, the data displays are the same throughout. The chief difference in is the data entry process.

System Requirements – and Environment

Optima is accessed through the internet as a secure web-based case management system. Generally used by a desktop or laptop computer, Optima is also compatible with most tablets, and smart phones through Optima GO!

Compatible Operating Systems and Browsers

Optima runs on a Microsoft Windows platform as well as iOS, an operating system developed by Apple. Recommended browsers are Microsoft Internet Explorer (version 9 or higher), Microsoft Edge, Mozilla Firefox, Safari, and Chrome from Google. A high-speed internet connection is necessary for efficient operation.

How to Log On to Optima – Using a Personal Computer

Optima is accessed through the internet using a unique, secure URL (uniform resource locator) commonly known as the “web address” for each GAL/CASA program within Indiana.

The format of the URL is as follows:

<https://in-countyname.evintosolutions.com>

| | |
|----------------------------|---|
| https:// | is used as the prefix to a secure web address |
| in- | signifies a web address for Indiana GAL/CASA programs |
| countyname | indicates the name of your county or unique program |
| . | a period separator |
| evintosolutions.com | is the main website location |

Note: The characters “www.” should NOT be in the address - those characters must be deleted.

To begin using Optima, follow these steps:

1. Open your internet browser and access your program’s unique **URL** (web address). If you do not know the URL, contact your local program staff.
2. If you wish, you may want to add this address/location to your **Favorites** or **Bookmark** depending on which browser you use.
3. The welcome screen displays as shown:



Please enter your user name and password.

A screenshot of the Optima login interface. It features a light gray background with a white rectangular form. Inside the form, there are two input fields: "User name" and "Password". Below the "Password" field is a checkbox labeled "Remember me?". To the right of the "Remember me?" checkbox is a blue hyperlink labeled "Forgot password?". At the bottom left of the form is a blue button with the text "Log On" in white.

The format of each Optima user's **Log On** identifier generally is the person's first name and last name. Your director or administrator will provide you with your **Log On** name.

Here is a sample: **Dottie.Davidson**

Firstname.**Lastname**

Firstname is typically the given first name of the user

. two "names" or "words" are **always** separated by a **period**

Lastname is typically the given last name of the user

1. The Log On identifier may be entered in all lower case letters, or an upper case letter at the beginning of each name/identifier.
2. The initial password is given by the local program administrator. The first time you logon, Optima will direct you to a screen where you will be prompted to create a new password that follows certain rules.
3. By clicking the **Remember me?** box, the password can be stored on the user's computer or device and will not need to be entered at subsequent Log On sessions. Users should never store the password on a public device or one that is used by unauthorized persons.
4. A user may change the password by clicking on the Reset my password link.

To activate Optima, press the **Log On** button.

Please enter your user name and password.



The screenshot shows a login form with the following elements:

- A label "Please enter your user name and password." above the form.
- A "User name" label next to a text input field containing "Dottie.Davidson".
- A "Password" label next to a password input field containing seven dots.
- A checkbox labeled "Remember me?" which is checked.
- A blue link labeled "Forgot password?".
- A blue "Log On" button at the bottom left of the form.

If a **User Name** and/or **Password** are entered incorrectly, a screen will display as shown with an error message. The user should re-enter the **User Name** and **Password** at least one time – there may be a typing error. If the user is still unable to **Log On**, the administrator, supervisor, or staff should be contacted to assist.



- Login was unsuccessful. Please correct the errors and try again.
- The user name or password provided is incorrect.

Please enter your user name and password.

A screenshot of a login form. It contains a "User name" field with the text "Dottie.Davidsno", a "Password" field, a "Remember me?" checkbox which is checked, and a "Forgot password?" link. A blue "Log On" button is located at the bottom left of the form area.


| | |
|--|--|
| User name | <input type="text" value="Dottie.Davidsno"/> |
| Password | <input type="password"/> |
| <input checked="" type="checkbox"/> Remember me? | Forgot password? |
| <input type="button" value="Log On"/> | |

User Passwords

A **Password** may be changed in two places. It may be changed at **Log On** time – see illustration below:

By clicking the **Remember me?** box, the password can be stored on the user's device and will not need to be entered at subsequent Log On events. A user may also click on the **Forgot password?** link. An email will be sent to the user with instructions on resetting the password.

Please enter your user name and password.

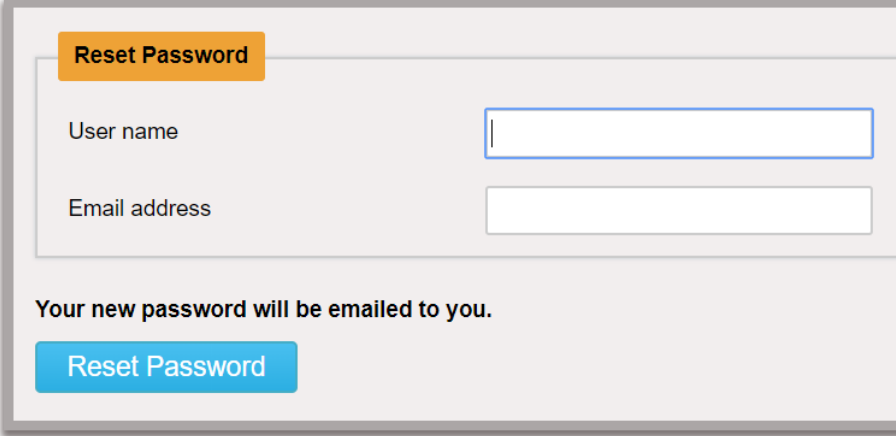


The screenshot shows a login form with the following elements:

- User name:** A text input field containing "Dottie.Davidson".
- Password:** A text input field containing six dots, highlighted in yellow.
- Remember me?:** A checkbox that is currently unchecked.
- Forgot password?:** A blue hyperlink with a red rectangular border around it.
- Log On:** A blue button located at the bottom left of the form.

When re-setting the password, Optima will display the screen as shown - proceed with steps 1-3.

 **RESET PASSWORD**



Reset Password

User name


Email address

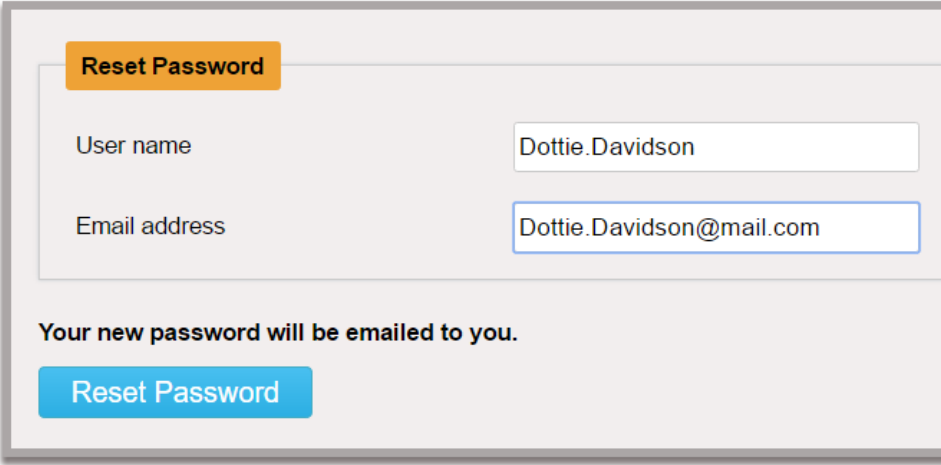
Your new password will be emailed to you.

Reset Password

1. Enter **User name**
2. Enter **Email address**
3. Click **Reset Password**

Sample:

 **RESET PASSWORD**



Reset Password

User name

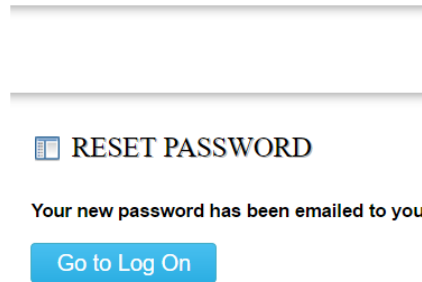
Email address

Your new password will be emailed to you.

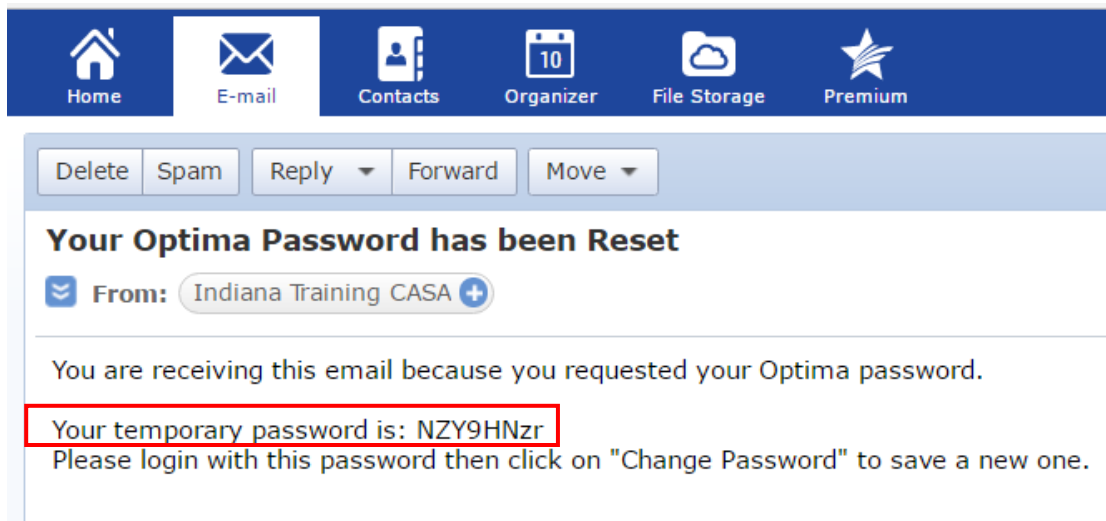
Reset Password



Optima will display this screen:



An email is then sent to the email address that was entered. A sample of a received email is shown below:

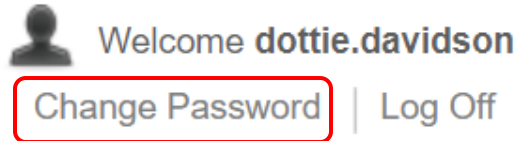


The email will contain a **temporary password**. Log On to Optima entering the **temporary password** as shown below. You should then be directed to the **Volunteer Dashboard** Welcome screen.

Please enter your user name and password.



Another method of changing the password is to use the **Change Password** function after you have completed the Log On process, at the Volunteer Dashboard Welcome screen.



Click on the **Change Password** link in the upper right-hand corner of the screen. The following screen will appear: (note, the password format will change effective July 1, 2020)

1. Enter your **Current Password**.
Note: The **Current Password** is the password you most recently used to **Log On**. It might be your new **temporary** password, or it might be one that you have used previously.
2. Enter the **New Password** you have selected (8 characters minimum).
3. Include one **lowercase** character; include one **uppercase** character; include one **special** character using
! @ \$ % & * ?
4. Re-enter the **New Password** you have selected to Confirm and validate.
5. Click **Change Password**.

CHANGE PASSWORD

Use the form below to change your password.

Account Information

Current password

New password

Confirm new password

New password must contain:

- One lowercase character

- One uppercase character

- One number or special character (!@\$\$%&*?)

- Eight characters minimum

Change Password

A verification screen will appear as shown below:

CHANGE PASSWORD

Your password has been changed successfully.

If you encounter errors, please return to the beginning of the process, and try again. It may be necessary to contact your supervisor or administrator. They have the authorization in Optima to reset your password at any time.

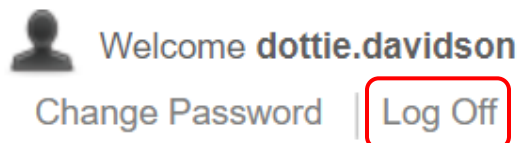
Security

Security is a chief concern when using Optima. Your database contains sensitive case data that you are responsible for when using the system. Please take care that your password is secret, known only to you. Do not share your password or Optima account with another volunteer or anyone else. Do not write down your password – just memorize it. And if other people use your computer, then don't let your browser store your password. Having your browser remember your password is just like telling everyone you know. If you see a "prompt" offering to save your login information, always answer "no" or "never for this site".

You should log off the Optima system anytime you walk away from your computer.

Log Off

To exit from using Optima, click Log Off in the upper right corner of any screen.



Automatic Logoff

Note: Optima will automatically log off the user from the system **60** minutes after last clicking a menu item, button, link, or action icon. A count-down timer will appear 5 minutes before logging off, giving you an opportunity to stay connected. Any transactions that have not been completed, such as a Contact Log, will not be saved.

Warning ✕

Your session is about to expire in

159seconds.

Do you want to continue ?

Stay Connected

Log Off

Graphics and Icons and Screen Advancing

Optima uses several standard **icons** and **graphic** symbols throughout the system.

Icons are generally located in the **Action** area.



This is an **EDIT** or **CREATE** icon. Hovering over the icon with a mouse pointer will cause a pop-up legend to appear with specific information. Generally, it allows the user to make changes to an item or series of items. Not all items in Optima have edit capabilities and not all users have editing privileges.



The “magnifying” or “spy” glass symbol is primarily used to **VIEW** a specific item, to inspect deeper, or to expand. Pausing over the icon with a mouse will cause a pop-up legend to appear for specific information.



This is a **DELETE** icon. Positioning the mouse pointer over the icon will cause a pop-up legend to appear with specific information to verify the delete action. The delete function is limited to certain items and not all users have the delete level of privilege.

Screen Advancing



Displaying items 1 - 2 of 2

There are sections of information that have multiple entries which cannot be displayed effectively on one screen. The icons illustrated above move the screen forward and backward.

From left to right, the actions are: **⏪ return to the beginning of the list**; **◀ go back one screen**; ***the page number display***; **▶ go forward one screen**; **⏩ go to the end of the list**.

The “**Displaying items**” message indicates the number of items that are currently being viewed and if there are more to be seen.

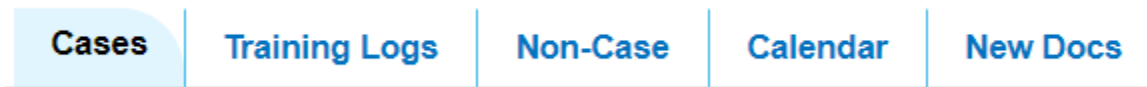
A filled **triangle symbol** ▲ or ▼ indicates the column of data can be sorted by clicking on the column title.

Volunteers Dashboard



The Volunteers Dashboard is the “home” or main screen that appears when first logging on to Optima. If lost during navigation, one can always return “home” by clicking on the Volunteers Dashboard icon.

At this location, there are a series of tabs that will be helpful in using additional features of Optima. Those tabs are:



The **Cases** tab is activated by default and shows a list of assigned cases.

The **Training Logs** tab allows volunteers to view their in-service training and add new items when they are completed.

Non-Case is where volunteers can enter activities that are not related specifically to their case, such as attending a social event, or promoting CASA or community event.

The **Calendar** will show important dates such as court hearings or Child and Family Team meetings. Volunteers can add events as they wish.

New Docs is where volunteers will find a list of documents that have been added to their case(s) in the last 14 days.



The **Address Book** and **Personal Info** functions are also available at the Volunteers Dashboard location as well as a **Help** function. These items are covered within this user guide.

Address Book – Overview and Entry



The **Address Book** allows the volunteer to create an electronic address book to use which will store names, addresses and other contact information. The address book is **not** linked to any information within the case(s).

[Address Book](#)

By clicking on Address Book, a screen will display a list of entries as shown:

ADDRESS BOOK

[Add](#)

| Last Name ▲ | First Name ▲ | Job Title ▲ | Work Phone ▲ | Cell Phone ▲ | Work Email ▲ | Action |
|-------------|--------------|-------------|--------------|--------------|--------------------|---|
| Tipton | John | Judge | 404-245-0220 | 404-239-4821 | john@tiptonlaw.org |   |

The list displays the **Last Name**, **First Name**, **Job Title**, **Work Phone**, **Cell Phone**, and **Work Email** of the entry. To view additional information or make changes, click on the **Edit** icon adjacent to the entry. To delete an entry, click on **X**. To add an entry, click on **Add**. Enter the name information, address and other data in the provided input locations. Enter The **CaseID** is a reference to **Case Numbers** that the volunteer is assigned. If desired, choose the case number from the selection menu. Click on **Create** or **Cancel**.

Contact

| | | | |
|-------------|----------------------|------------|----------------------|
| First Name | <input type="text"/> | Home Email | <input type="text"/> |
| Middle Name | <input type="text"/> | Work Email | <input type="text"/> |
| Last Name | <input type="text"/> | Home Phone | <input type="text"/> |
| Job Title | <input type="text"/> | Work Phone | <input type="text"/> |
| Address | <input type="text"/> | Cell Phone | <input type="text"/> |
| Address2 | <input type="text"/> | Case | <<None>> ▼ |
| City | <input type="text"/> | Notes | <input type="text"/> |
| State | <input type="text"/> | | |
| Zip | <input type="text"/> | | |

[Cancel](#) [Create](#)

(0 out of 2000)

Personal Info – Overview and Entry

The Personal Info function allows a volunteer to edit demographic information – see display below. This section can only be viewed by the local GAL/CASA program staff. It is not shared outside the organization. Click on **Personal Info**, and then click on **Edit** to make changes.


Personal Info

Demographics

Edit

| | | | |
|----------------|--------------------------|----------------------------|--|
| First Name | Dottie | Gender | Female |
| Middle Name | Danielle | Home Email | dottie@home.com |
| Last Name | Davidson | Work Email | dottie@work.com |
| AKA | Harris | Best Email | Work |
| Address | 1812 South London Lane | Home Phone | 812-349-8521 |
| Address 2 | | Cell Phone | 317-694-5858 |
| City | Springfield | Work Phone | 765-342-5000 |
| State | IN | Best Phone | Cell |
| Zip | 47716 | Permission to Call at Work | <input checked="" type="checkbox"/> |
| County | Wells | Permission to Share Info | <input checked="" type="checkbox"/> |
| Hispanic | <input type="checkbox"/> | | |
| Race | Caucasian or White | | |
| Marital Status | Married | | |

Edit Demographics

| | | | |
|----------------|---|----------------------------|---|
| First Name | <input type="text" value="Dottie"/> | Gender | <input type="radio"/> Male <input checked="" type="radio"/> Female |
| Middle Name | <input type="text" value="Danielle"/> | Birthdate | <input type="text" value="3/2/1965"/>  |
| Last Name | <input type="text" value="Davidson"/> | Home Email | <input type="text" value="dottie@home.com"/> |
| AKA | <input type="text" value="Harris"/> | Work Email | <input type="text" value="dottie@work.com"/> |
| SSN | <input type="text" value="211-93-5594"/> | Best Email | <input type="text" value="Work"/> ▼ |
| Address | <input type="text" value="1812 South London Lane"/> | Home Phone | <input type="text" value="812-349-8521"/> |
| Address 2 | <input type="text"/> | Cell Phone | <input type="text" value="317-694-5858"/> |
| City | <input type="text" value="Springfield"/> | Work Phone | <input type="text" value="765-342-5000"/> |
| State | <input type="text" value="IN"/> | Best Phone | <input type="text" value="Cell"/> ▼ |
| Zip | <input type="text" value="47716"/> | Permission to Call at Work | <input checked="" type="checkbox"/> |
| County | <input type="text" value="Wells"/> ▼ | Permission to Share Info | <input checked="" type="checkbox"/> |
| Hispanic | <input type="checkbox"/> | | |
| Race | <input type="text" value="Caucasian or White"/> ▼ | | |
| Marital Status | <input type="text" value="Married"/> ▼ | | |

Cancel

Save

Make changes as needed to the data fields shown above and click **Save** when completed.

Personal Info - Emergency Contacts

Beneath the **Volunteer** Demographics area, there is a section to record **Emergency Contacts** information regarding the Volunteer. To enter data, click on **Add**.

Emergency Contacts

Add

| First Name | Last Name | Phone | Phone 2 | Email | Action |
|------------|-----------|----------------|----------------|--------------------------|---|
| Herbert | Davidson | (317) 881-0009 | (812) 335-9377 | herbiesuperdude@gmail... |   |

A data entry screen will appear

Add Emergency Contact

Enter the **First Name** and **Last Name** of the person to contact in case of an emergency.

First Name

Phone 2

Enter the best **Phone numbers** to reach this person.

Last Name

Relationship

Identify the **Relationship** between the volunteer and the individual.

Phone

Email

Enter the person's **Email** address.

Cancel

Create

Click Create when completed.

Changes may also be made to Emergency Contacts by selecting the **Edit Action** icon, making the changes and clicking on Save.

Personal Info – Current Employment

A volunteer may edit the **Current Employment** details in the individual's record, click on **Add** or **Edit** as shown. A data entry screen will appear.



Choose the individual's **Career Type** and **Employment Status** from the selection menu and Indicate if this is the Individual's **Current Employer**.

Enter the **Company name Address** and other location Information.

Enter the individual's **Title, Responsibilities, Work Hours, From Date, To Date, Reason For Leaving, Supervisor's First and Last Name, Check the Permission To Contact** indicator if Appropriate, Supervisor's **Phone Number**. Click on **Save**.

| Edit Employment | |
|-----------------------|--|
| Career Type | Other Profession ▼ |
| Employment Status | Part Time ▼ |
| Current Employer | <input checked="" type="checkbox"/> |
| Company | Indianapolis Newspapers, Inc. |
| Address | 307 North Pennsylvania Street |
| Address2 | PO Boc 30700 |
| City | Indianapolis |
| State | IN |
| Zip | 46202 |
| Title | Managing Editor |
| Responsibilities | Edits front page news only. |
| Work Hours | Monday through Wednesday |
| From Date | 6/23/2005 <input type="button" value="Calendar"/> |
| To Date | <input type="text"/> <input type="button" value="Calendar"/> |
| Reason For Leaving | <input type="text"/> |
| Supervisor First Name | Allen |
| Supervisor Last Name | Barstow |
| Permission To Contact | <input checked="" type="checkbox"/> |
| Phone Number | 317-636-6000 |

Training Logs - Overview

Cases

Training Logs

Non-Case

Calendar

New Docs

Add

Total YTD Hours: 25.00 Total YTD Miles: 0

| Complete Date ▼ | Training Topic ▼ | Hours | Mileage ▼ | Status ▲ | Action |
|-----------------|---------------------------|-------|-----------|----------|--------|
| 3/5/2019 | Driving in winter weather | 25 | | Approved | |

Each volunteer is required to continue advocacy-related training by completing 12 hours of education per year. Depending on your local program, accumulating hours can consist of attending seminars, workshops, and conferences. It is the responsibility of the Volunteers in most programs to keep track of their training activities

A Volunteer has full editing capabilities of training log items they enter. All training log entries must be approved at some level of administration.

Training Logs - Activating this tab will display a list of Training Log activities that the volunteer has completed, both approved and pending. It also displays the YTD (year-to-date) number of hours spent in training and YTD number miles that the volunteer has reported through the training activity log.

Complete Date shows when the training finished

Training Topic indicates the subject of the training

Hours indicates the number of hours expended

Mileage shows the number of miles driven to and from and training event

Status shows if the training has been approved or is pending

Action allows for viewing of additional information

Training Logs – Create an Entry

Click on **Add** and the following screen will appear:

Enter the **Schedule Date** and the **Complete Date** or use the calendar icon to select.

Click on **<<Select a Value>>** and choose a **Training Topic** from the selections.

Click on **<<Select a Value>>** and choose a **Training Format** from the selections.



Choose a **Trainer** from the selections.

Enter the number of **Hours** attended.

Enter the number of **Miles** driven to/from the event per your program's guidelines.

Enter **Notes** and click on **Create**.

In-Service Training

| | | |
|-----------------|---|---|
| Schedule Date | <input type="text"/> |  |
| Complete Date | <input type="text"/> |  |
| Training Topic | << Select a Value >> | |
| Training Format | << Select a Value >> | |
| Trainer | <input type="text"/> | |
| Hours | <input type="text"/> | |
| Mileage | <input type="text"/> | |
| Notes | <input type="text"/> | |

(0 out of 2000)

Important Note: If the **Training Topic**, **Training Format**, or **Trainer** values are not in the selection menus, contact the local program director and request an update.

Non-Case Activity – Overview - Create an Entry

Cases

Training Logs





Non-Case

Calendar

New Docs

There may be times when a Volunteer performs activities that do not relate to a specific case. However, your program will want to keep a record of those activities to show a better view of efforts made to support your organization.

Volunteers may enter and update their respective entries. The Non-Case screen displays the date of past events, the name of the event, the number of hours, the mileage driven, and an action section where the entry may be edited or deleted.

| Date ▾ | Event ▲ | Hours ▾ | Mileage ▾ | Action |
|-----------|---------------------------|---------|-----------|---|
| 8/01/2018 | Passed out CASA brochures | 55 | |   |
| 6/20/2017 | National CASA Project | 2.5 | |   |

To add an entry, select the **Non-Case** tab and click on **Add**. The following data entry screen will appear.

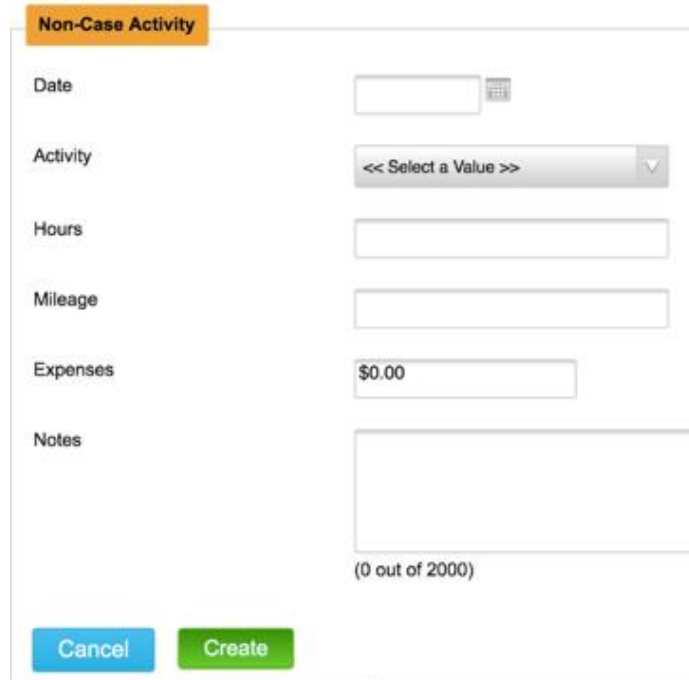
 ADD

Enter the **Date** of the activity in the space provided or use the adjacent calendar.


Choose the **Activity** from the selection menu by clicking on **<<Select a Value>>**

And enter **Hours**, **Mileage** and **Expenses** incurred.

Notes may be entered in the **Notes** section. Click on **Create**.



Non-Case Activity

Date 

Activity

Hours

Mileage

Expenses

Notes

(0 out of 2000)

Important Note: If the **Activity** values are not in the selection menus, contact the local program director and request an update.

Calendar - Overview

Cases

Training Logs

Non-Case

Calendar

New Docs

The Calendar Function allows volunteers to view upcoming hearings, training events, non-case activity events, and any other important dates to be aware of.

Some of the calendar entries appear automatically such as upcoming hearings. Once a hearing event is created, it will be displayed with the date and time.

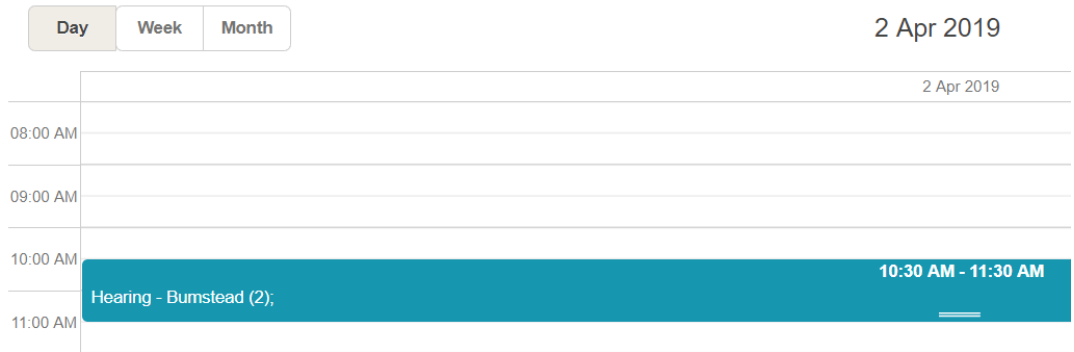
Creating training events or meetings, such as Child and Family Team Meetings can be added to the calendar. Staff and supervisors have the option of selecting which individuals should attend.

The calendar can be viewed by agenda, by volunteer, by week or my month and by day. Volunteers have update capabilities for events they create or are linked to.

The calendar can be viewed by agenda, by volunteer, by week or my month and by day.

| Day | Week | Month | April 2019 | | | |
|--------|------|-------|------------|----------------------------------|-----------|--|
| Sunday | | | Monday | Tuesday | Wednesday | |
| 31 | | | 01 | 02 | 03 | |
| | | | | • 10:30 AM Hearing - Bumstead (2 | | |
| 07 | | | 08 | 09 | 10 | |
| 14 | | | 15 | 16 | 17 | |

| Day | Week | Month | 31 Mar 2019 – 6 Apr 2019 | | | |
|----------|------|-------|--------------------------|--------------|--|--------------|
| | | | Sun, March 31 | Mon, April 1 | Tue, April 2 | Wed, April 3 |
| 08:00 AM | | | | | | |
| 09:00 AM | | | | | | |
| 10:00 AM | | | | | 10:30 AM - 11:30 AM Hearing - Bumstead (2); | |
| 11:00 AM | | | | | | |



Calendar – How to Enter an Event

To create an event on the calendar, double-click on the day of the event. A new screen will appear:

08:00 AM - 08:05 AM New event

Description New event

Time period 08:00 AM ▼ 29 ▼ April ▼ 2019 ▼ – 08:05 AM ▼ 29 ▼ April ▼ 2019 ▼

Notes

Case --None-- ▼

Save **Save/Export as iCal** **Cancel** **Delete**

Enter the description of the event; adjust the time period if necessary and add any appropriate notes in the notes section.

If the event pertains to a certain case, click on the down arrow in the Case section, and your assigned cases will appear to select from. Once the data has been entered, click Save.

Below is an example of a data entry screen with a new calendar event.

Description CFTM Meeting at the DCS Office.

Time period 09:00 AM ▾ 29 ▾ April ▾ 2019 ▾ – 10:30 AM ▾ 29 ▾ April ▾ 2019 ▾

Notes FCM Johnson indicated we would be discussing a new safety plan for the children.

Case Bumstead (2) - 00C01-1901-JC-000001/2 ▾

Save **Save/Export as iCal** **Cancel** **Delete**

And below is how the event appears on the calendar:

Day Week Month

| | Sun, April 28 | Mon, April 29 | Tue, April 30 |
|----------|---------------|--|---------------|
| 08:00 AM | | | |
| 09:00 AM | | 09:00 AM - 10:35 AM CFTM Meeting at the DCS Office. | |
| 10:00 AM | | | |
| 11:00 AM | | | |

Calendar events can be deleted or modified.

New Docs

Cases


Training Logs

Non-Case

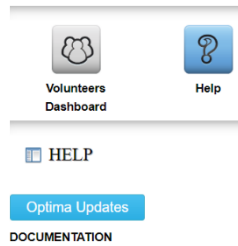
Calendar

New Docs

New Docs will show the most recent documents that have been uploaded to a case within the past 14 days based on upload date.

| Case Number ▲ | Case Name ▲ | File Name ▲ | Document Type ▲ | Added By ▲ | Add Date ▼ | Action |
|------------------------|--------------|----------------------------------|---------------------|------------------|------------|---|
| 00C01-1901-JC-000001/2 | Bumstead (2) | Triage Data.xlsx | Other/Miscellaneous | Davidson, Dottie | 4/28/2019 |  |

Help Function



The Help function will display a list of updates to the Optima system. It is managed by the Optima organization and updated periodically. If volunteers need assistance with any function or feature within Optima, they are to contact their local program staff directly. Please do not contact the Optima staff.

Case Information – Overview

Case Information

Case Information is the section where the basic facts of the case are displayed: the case name and number, the county where the case is assigned and the date of the petition. This data rarely changes once the case has been created. The Volunteer can only “view” this information.

Case Information

[Edit](#)

| | |
|----------------|--------------------------|
| Case Number | 00C01-1901-JC-000001/2 |
| Case Name | Bumstead (2) |
| County | Adams |
| Jurisdiction | Lincoln Circuit Court |
| Priority Case? | <input type="checkbox"/> |
| Petition Date | 10/1/2019 |
| Notes | |

The **Case Information** display shows the:

Case Number – the number assigned to the specific case

Case Name – the name associated with the case

County – the county where the case is located

Jurisdiction – the jurisdiction of the case – often the County name/number

Priority Case? – indicates if the case is a priority

Petition Date – the date of the petition

Notes – any notes entered when the case was created of interest

The **Legal Status** section is not generally used

Legal Status

[Add](#)

Type ▲

Date ▼

No records to display.

Case Assignment – Overview

Case Assignments

The **Case Assignments** area shows who is assigned to advocate for the child, or children. In addition, if the local program has supervisors or other type of advocate, they will be listed. The information contains the dates of assignment and other data. The Volunteer has “view” permission only.

Case Assignments

| Name ▲ | Type ▲ | Supervisor | Assigned ▼ | Released ▼ | Reason ▲ | Contact Info ▲ |
|-------------------|------------|-------------------------------------|------------|------------|----------|--|
| Supervisor, Sally | Supervisor | <input checked="" type="checkbox"/> | 1/1/2019 | | | 317-831-4562 supervisor@mycounty.in |
| Davidson, Dottie | Volunteer | <input type="checkbox"/> | 3/28/2019 | | | 317-694-5858 dottie@work.com |

The **Case Assignments** section indicates the name(s) of the Volunteer(s) and/or Supervisor assigned to the case.

Name – Name of the individual

Type – Indicates the type of individual

Supervisor – Indicates if this particular individual has supervisory privileges

Assigned – the date the individual was assigned to the case

Released – the date the individual was released from the case

Reason – the reason the individual was released from the case



Contact Info – the best phone number and best email address to contact the person

Children in Case – Overview

Children in Case

The **Children in Case** is where we find all of the details pertaining to each child. Optima is “case” based. There are several sub-sections where the Volunteer may update information regarding the **child**.

Children in Case

| Name ▲ | AKA/Alias ▲ | Gender ▲ | Child Age ▲ | Close Date ▼ | Volunteer ▲ | Supervisor ▲ | Next Hearing ▼ | Action |
|---------------------|-------------|----------|-------------|--------------|------------------|-------------------|----------------|---|
| Bumstead, Alexander | | Male | 2 | | Davidson, Dottie | Supervisor, Sally | |  |
| Bumstead, Cookie | | Female | 1 | | Davidson, Dottie | Supervisor, Sally | |  |

The **Children in Case** area provides an overview of each child’s general information.

Name – name of the child

AKA/Alias – the alias or “also known as” of the child, such as a nickname

Gender – the gender of the child

Age – the age of the child – the system calculates age based on birthdate and the date the information is viewed; a child less than one year old appears as zero

Close Date – a child’s case may be closed while a sibling’s case remains open

Volunteer – name of volunteer(s)

Supervisor – name of supervisor

Next Hearing – date of the next hearing (may not always show here)

Action – allows viewing details of the child

Current Placements – Overview

Current Placements

The **Current Placements** shows where each child is currently housed. Their placement may be with a relative, a foster home, a residential center or other. The address and contact information of the placement is available in this section.

The Volunteer has some limited editing capabilities. Changes in placement can be made, however, this is usually done by the administrative staff of the local program.

Current Placements

Add

| Name ▲ | Placement ▲ | From ▼ | Reason ▲ | With Siblings ▲ | Contact Name ▲ | Contact Info ▲ | Action |
|---------------------|---|-----------|------------------|-----------------|----------------------|--|--------|
| Bumstead, Alexander | Central Indiana Good Home | 4/15/2019 | Imminent Risk | None | Gina Williams | 812-997-9441 gina@CINGH.org | |
| Bumstead, Cookie | In-Home CHINS | 4/15/2019 | Trial Home Visit | None | Bumstead, Daqwood | | |

The **Current Placements** section displays an overview of information regarding the placement of the child.

Name – name of the child

Placement – name of the person or facility where the child is placed

From – beginning date of the placement

Reason – reason child was placed

With Siblings – indicates if other siblings are placed as well

Contact Name – name of person responsible or in authority at placement

Contact Info – best phone number and email for contact

Action – allows viewing details of the placement

Family Members – Overview



Family Members

The Family Members section is where Optima stores information about the family members, the mother and father of the child. Sometimes a step-parent is found in this section if applicable, or a grandparent. Depending on your local program's guidelines, often this section is reserved only for individuals who are legal parties to the case. On the other hand, people who are closely attached to the child may be found here as well.

Although a Volunteer generally cannot add a family member, several areas can be updated as needed by the Volunteer as shown. Some programs do allow volunteers to create Family Members. Check with your local program director for more information.

Family Members

Add

| Name ▲ | AKA ▲ | Relationship ▲ | Active ▲ | Deceased ▲ | Contact Info | Action |
|-------------------|-------|----------------|-------------------------------------|--------------------------|--------------|---|
| Bumstead, Blondie | | Mother | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 219-887-6571 |  |
| Bumstead, Dagwood | | Father | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 800-800-5556 |  |

Family Members displays an overview of information regarding the key family members in the case.

Name – name of family member

AKA – “also known as” – could be a nickname, maiden name, inmate number

Relationship – relationship between this individual and the child

Active – indicator that person is still active with the case

Deceased – indicator that person is deceased

Contact Info – best phone number and email for contact

Action – allows viewing details of the family member

Note: Some programs allow volunteers to enter new family members or edit family member information. Check with your local program to see if those features are available to you.

Case Details – Tabs Section – Overview

At the bottom of the display will be a series of what appear to be “tabs” of a file folder.

Contact Logs

Associated Parties

Wellbeing

Documents

Petitions and Allegations

Hearings

Placement History

Behind each tab you will find information of greater detail. The tabs are:

Contact Logs – this is the most active area for a Volunteer. All of the Volunteer’s notes and activities regarding the case are recorded here.

Associated Parties – there are often several people who are associated with a case other than family member. This section stores data regarding the caseworkers, attorneys, counselors, therapists, teachers, clergy, and so forth.

Wellbeing – Only used in specific programs.

Documents – each case generally has many documents that are important to the case. Where multiple children are involved, the number of documents can grow dramatically. This section is where you will find copies of all case documents.

Petitions and Allegations – this section contains the petition and allegation information – it does not contain the actual document(s) – they would be stored in the document area. This data provides who the allegations are against.

Hearings – each court hearing for the case is listed here. Optima maintains a history of the hearings and the orders that relate to each one, who attended, etc.


Placement History – similar to the Placement section, this area provides a complete history of placements for each child from the beginning of the case.

Contact Logs - Overview

Add

View Notes

Search

| Name | Type | Subject | Date | Hours | Status | Action |
|-------------------|------------------------------------|--------------------|-----------|-------|----------|---|
| Supervisor, Sally | Contact with DCS (FCM or other) | Call with Harriett | 4/23/2019 | 0.5 | Approved |  |

Contact Logs displays an overview of each contact log that has been entered regarding the case.

Name – the person, generally the volunteer, who entered the log

Type – type of contact

Subject – topic of contact

Date – date the contact occurred

Hours – number of hours spent



Status – indicates if the entry has been approved or is pending

Action – allows for editing or deleting

Contact Logs – How to Enter

Contact Logs are created when an event occurs that pertains to the case. This could be a visit with the child, the parents, attending a Child and Family Team Meeting, attending a court hearing, reading an email, making a phone call, etc. In other words, anything that a volunteer does regarding the advocacy of the case should be recorded in a contact log. The log gives the local and state GAL/CASA programs a way of knowing how many hours volunteers donate in addition to documenting valuable information about the case.

To enter a contact log, navigate to the Contact Log section within the appropriate case. To do this, click the Edit icon to the far right of the case as shown at the Volunteer Dashboard.

| Cases | Training Logs | Non-Case | Calendar | New Docs |
|--|---------------|-----------------|---|----------|
| Case Number ▲ | Case Name ▲ | Petition Date ▼ | Action | |
| 00C01-1901-JC-000001/2 | Bumstead (2) | 10/1/2019 |   | |

This action will open a blank Contact Log form ready for data entry.




Another way to open a Contact Log form is to navigate to the tabs section within the case and click on Add under the Contact Log label as shown:



 ADD

Contact Log

Case Number and **Case Name** will automatically appear.
Activity Date can be typed in or selected from the calendar icon.
Activity Type is a selection menu – click the arrow to see the list of choices.
Subject is a free-form text box to uniquely identify the event or activity.
Out of Court indicator box is not used.
Contact Type is a selection menu – click the arrow to see the list of choices.
Hours - enter the number of hours in decimal format.
Mileage – enter the number of miles driven if appropriate.
Expenses – enter any expenses if appropriate.

| | |
|---------------|--|
| Case Number: | 00C01-1901-JC-000001/2 |
| Case Name: | Bumstead (2) |
| Activity Date | 4/30/2020  |
| Activity Type | <input type="text"/>  |
| Subject | <input type="text"/> |
| Out of Court | <input type="checkbox"/> |
| Contact Type | <input type="text"/>  |
| Hours | <input type="text"/> |
| Mileage | <input type="text"/> |
| Expenses | \$0.00 |

The Notes box is where the case notes are entered. It is recommended to write the notes in complete sentences, avoiding abbreviations. The text is not spell-checked, or grammar checked. Notes may be entered in Word and then copied/pasted into the box. There is a character counter at the bottom of the box to alert the writer when the capacity is near the 5,000-character limit.

Notes

(0 out of 5000)

The **Select** box is checked adjacent to the name of the individual the contact log pertains to; the Party Type is reference information on the role of the individual.

| Select | Pertains to | Party Type |
|--------------------------|--------------------|---------------|
| <input type="checkbox"/> | F. Lee Bailey | Attorney |
| <input type="checkbox"/> | Harriett Harwell | Caseworker |
| <input type="checkbox"/> | Alexander Bumstead | Child |
| <input type="checkbox"/> | Cookie Bumstead | Child |
| <input type="checkbox"/> | Blondie Bumstead | Family Member |
| <input type="checkbox"/> | Dagwood Bumstead | Family Member |
| <input type="checkbox"/> | Basil Exposition | Principal |

The **Others Contacted:** section allows for entry of three additional individuals who the contact log pertains to or person(s) contacted. The **Relationship** entry defines how the person is associated with the case.

Others Contacted:

First Name

Last Name

Relationship

To complete the entry of the Contact Log, click **Create**. The Contact Log is not saved until the Create function has taken place.

Cancel

Create

If you have a lengthy note to enter, consider typing the note in your word processor and saving/editing within a document. When finished, then copy/paste the text into the notes box of the contact log.

The following graphic gives additional information about the various data fields within a Contact Log.

| | |
|---------------------------|---|
| Case Number | The case number will appear for verification |
| Case Name | The case name will appear for verification |
| Activity Date | The actual date of the event; or an arbitrary date used to enter multiple activities such as a week's worth of emails – required |
| Activity Type | Choose from the selection menu - required |
| Subject | Free-form text to describe the event; a unique label; optional but helpful |
| Out of Court | Not needed; may skip over |
| Contact Type | Choose from the selection menu - required |
| Hours | Entered in decimals; 15 minutes (.25) is the minimum amount 30 minutes = .5 60 minutes = 1 75 minutes = 1.25 90 minutes = 1.5 - required |
| Mileage | Optional – whole numbers |
| Expenses | Optional – dollars and cents |
| Notes | 5,000 characters, about 800 words; if note is lengthy, create in Word first, spell-check, then copy/paste into note; try to write complete sentences to use for court reports; required |
| Cancel | Pressing Cancel terminates the creation of the note or stops the process |
| Create | Create produces the note and saves it in the case file; required |
| Select Pertains To | Check <input checked="" type="checkbox"/> the name of the person(s) the contact log pertains to; names come from the child section, family member section, and associated party sections; generally required |
| Others Contacted | Provides space to enter names of other persons contacted not listed above; requires entering data in two of the three available lines per contact |
| First Name | First name of other person |
| Last Name | Last name of other person |
| Relationship | Relationship of this person to the case |

Note about Hours: Hours are entered in decimal format. The **minimum amount of time is .25 which equates to 15 minutes.** Even if the activity is less than 15 minutes, the amount of time would still be .25. The only time that zero hours would be appropriate would be if the event did not consume any time, which would be rare. Please do not enter hours less than .25 without speaking to a representative from the local GAL/CASA program.

Associated Parties - Overview

| Name ▲ | Association ▲ | Type ▲ | Company ▲ | Child | Family | Released | Contact Info ▲ | Action |
|-------------------|------------------|-----------|----------------------|-------------------------------------|-------------------------------------|--------------------------|--|--------|
| Bailey, F. Lee | Attorney | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 218-456-7812 flee@flee.com | |
| Exposition, Basil | Interested Party | Principal | Britannia Elementary | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Harwell, Harriett | Caseworker | | DCS | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 317-244-9514 Harriett Harwell@d | |

Associated Parties displays a list of other individuals who are typically non-family members. This group consists of caseworkers, attorneys and interested people such as a therapist, landlord, or another service provider.

Name – name of individual

Association – identifies relationship to the overall case

Type – category of association

Company – organization individual is affiliated with

Child – indicates if the associated party relates to the child

Family – indicates if the associated party relates to the family

Released – indicator the associated party is no longer involved

Contact Info – best phone and email address to contact

Action – allows for detailed view

Note: Some programs all volunteers to enter new associated parties or edit associated party information. Check with your local program to see if those features are available to you.

Documents - Overview

| File Name ▲ | Document Date ▼ | Add Date ▲ | Document Type ▲ | Action |
|---|-----------------|------------|------------------------------------|--------|
| Exception Reports - Volunteers - Quick Reference.docx | 2/25/2019 | 2/27/2019 | Notice Of Hearing | 🔍 |
| Permanent Plans.docx | 1/14/2019 | 2/24/2019 | Order Approving Permanency Plan | 🔍 |

Documents displays a list of documents pertaining to the case that have been uploaded and stored for reference.

File Name – name of file that was uploaded

Document Date – date the file was created

Add Date – the date the document was uploaded

Document Type – category of document contents

Action – allows for viewing

Documents – How to Add

To add a Document to the case, click on **Add**



A data selection screen will appear. Select the **File Name** by clicking on the **Choose File** selection button. You will need to know where the file is located before starting this process. It may be on a network drive, a hard drive on a computer, or was scanned and saved in a location.

Then select **Document Type** from the **Select Type** menu and modify the **Upload Date** if necessary. Then click on **Save**.

ADD

Document

Case Alpha - 00D08-1608-JC-000002

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

Document Type << Select Type >>

Document Date 9/5/2016

Cancel Save

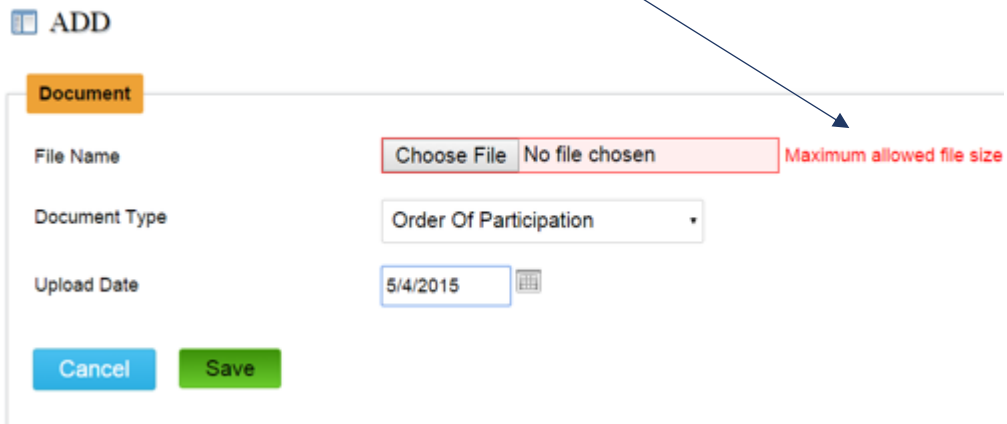
You may upload **multiple documents** at the same time. **However, they must be the same document type, and for the same case.** To upload multiple documents, press and hold the **Ctrl** key while selecting documents from the source file. The size limitation remains the same for each document.

Document Size - Important Note

The size of a document, in terms of “bytes” is very important. At the present time, Optima can accept about 5 megabytes of data. Or in terms of kilobytes, 7,000. This equates to around 30-35 pages of typed materials. If graphics are included, the number of pages may need to be smaller.

If you are scanning a very large file, separating it into two, perhaps three, separate “documents” should work. You would then re-name them as “part-1” or something similar such as “page 1-28” and “page 29-47” etc. then upload them individually. Consider lowering the resolution on your scanner, if possible, to 200 dpi. Also, set your scanner to B&W (black and white) and NOT color.



If you happen to attempt to upload a document that's larger the 5,000 KB (5 megabytes) you will receive this error message:



The screenshot shows a web form titled "Document" with an "ADD" button. The form contains three input fields: "File Name" with a "Choose File" button and "No file chosen" text, "Document Type" with a dropdown menu set to "Order Of Participation", and "Upload Date" with a date picker set to "5/4/2015". At the bottom are "Cancel" and "Save" buttons. A red error message "Maximum allowed file size" is displayed next to the "File Name" field, with a blue arrow pointing from the text above to it.

Remember that a document with graphics typically will be much larger than a document that contains only text.

Petitions and Allegations - Overview

| Petition No. ▲ | Name ▲ | Petition Date ▼ | Petition End Date ▼ | Type ▲ | Action |
|----------------------|---------------------|-----------------|---------------------|--------|---|
| 59C01-1712-JC-000331 | Bumstead, Alexander | 4/8/2019 | | JS |  |
| 59C01-1712-JC-000331 | Bumstead, Cookie | 4/8/2019 | | JS |  |

The **Petition and Allegations** section shows each petition per child as relates to the case.

Petition No. – the court-assigned number (cause number)

Name – name of the child on the petition


Petition Date – date the petition was filed

Petition End Date – date the petition ended

Type – category of petition

Action – allows additional viewing of details

Hearings - Overview

| Date ▼ | Time ▼ | Report Due | Location ▲ | Hearing Type ▲ | Judge ▲ | Status ▲ | Action |
|-----------|----------|------------|---------------|----------------|-------------|-------------|---|
| 5/15/2019 | 11:45 AM | 5/8/2019 | Circuit Court | Dispositional | John Tipton | On calendar |  |

Hearings displays an overview of all hearings related to the case.

Date – date of the hearing

Time – beginning time of the hearing

Report Due – due date of the volunteer’s report

Location – location of hearing

Hearing Type – category of hearing

Judge – name of presiding official

Status – refers to current condition or progress of the hearing

Action – allows for additional review

Placement History - Overview

| Name ▲ | Placement ▼ | From ▼ | To ▼ | Reason ▲ | With Siblings ▲ | Contact Name | Contact Info | Action |
|---------------------|---------------------------------|-----------|------|---------------------|-----------------|----------------------|---------------------------------|---|
| Bumstead, Alexander | Central Indiana Good Home | 4/15/2019 | | Imminent Risk | None | Gina Williams | 812-997- 9441 gina@CIN... |  |
| Bumstead, Cookie | In-Home CHINS | 4/15/2019 | | Trial Home Visit | None | Bumstead, Dagwood | 800-800- 5556 |  |

The **Placements History** section displays an overview of information regarding the history of placements of the child.

Name – name of the child

Placement – name of the person or facility where the child is placed

From – beginning date of the placement

To – ending date of the placement

Reason – reason child was placed or removed

With Siblings – indicates if other siblings are placed as well

Contact Name – name of person responsible or in authority at placement

Contact Info – best phone number and email for contact

Action – allows viewing details of the placement

Child Details – Closer View

Details of each child can be viewed as shown below.

| | | | |
|----------------------------|--|-----------------------------------|----------|
| Case | Bumstead (2) - 00C01-1901-JC-000001/2 | | |
| Edit | | | |
| First Name | Alexander | Assigned to Program | 3/1/2019 |
| Middle Name | Beauregard | Most Recent Efforts Date | |
| Last Name | Bumstead | Edit Child Status | |
| AKA | Beau | Child Status | |
| Birthdate | 6/6/2016 | Status Date | |
| SSN | 266-99-4747 | County | Adams |
| ID Number | | Geo Location | Suburban |
| Gender | Male | Zip Code | 47441 |
| Hispanic | <input checked="" type="checkbox"/> | Notes | |
| Race | Multi-Racial | Closing Information: | |
| Referred By | Department Of Child Services | Program Closure Date | |
| Referral Date | 2/21/2019 | Program Closure Reason | |
| Referral Reason | Trauma | Court Closure Date | |
| Removed From Home | <input checked="" type="checkbox"/> | Court Closure Reason | |
| Removed Date | 2/5/2019 | Closing Notes | |
| Removed From | Parents | | |
| Prior Placements | 0 | | |
| Months in Prior Placements | 0 | | |
| Deceased | <input type="checkbox"/> | | |

The child record also contains several tabs with additional information within. Those tabs are:

| | | | | | |
|------------------|---------------------|-----------------------|----------------------------|--------------------|-------------------|
| Languages | Disabilities | Schools | Social Media | Eligibility | Placements |
| Hearings | Services | Permanent Plan | Closing Information | | |

Languages: Indicates the primary and other languages pertaining to the child. Additional languages may be added as necessary.

[Add](#)

| Language ▲ | Primary Language ▲ |
|------------|-------------------------------------|
| Spanish | <input checked="" type="checkbox"/> |

Disabilities: Indicates disabilities pertaining to the child. Additional disability identifiers may be added as needed.

[Add](#)

| Disability ▲ |
|-------------------|
| Visual Impairment |

Schools: This section contains pertinent information regarding the school(s) the child attends or has attended. Volunteers can add or make changes if needed.

IEP



[Edit](#)

Individualized Education Program YES NO

Renewal Date

School History

[Add](#)

| School Name ▲ | Grade ▲ | Start Date ▼ | End Date ▼ | Transfer Reason ▲ | Contact Name ▲ | Contact Info ▲ | Action |
|-----------------------|---------|--------------|------------|---------------------------|----------------|--|---|
| Northbrook Elementary | 3 | 8/25/2018 | 5/25/2019 | Transfer From Home School | Henry Simmons | 4805451222 HenrySimmons@... 12.in.us |   |

Social Media: This section allows tracking of the child's social media account name and which Social Media accounts are active.

[Add](#)

| Social Media ▲ | User Name ▲ |
|----------------|------------------|
| Facebook | Alice28-GirlHero |

Eligibility: Indicates special coding typically used by the local program to identify children enrolled in certain programs. View status only – cannot edit.

| Eligible Status ▲ | Date ▼ |
|-------------------------------|------------|
| VOCA | 4/3/2019 |
| TPR - OPEN - Served-Volunteer | 10/15/2018 |

Placements: Shows the history of the child’s placement since the case was opened. View status only – cannot edit.

| Hearing Date ▼ | Placement ▲ | From ▼ | To ▼ | Reason ▲ | With Siblings ▲ | Contact Name ▲ | Contact Info ▲ |
|----------------|---------------------------|-----------|-----------|---------------|-----------------|----------------|----------------------------------|
| 6/6/2018 | Smith, Tom and Mary | 2/26/2019 | 2/28/2019 | Imminent Risk | None | Tom Smith | 317-694-8855 tomandmary@smith |
| | Central Indiana Good Home | 4/15/2019 | | Imminent Risk | None | Gina Williams | 812-997-9441 gina@CINGH.org |

Hearings: Displays a high-level view of the hearings associated with the child. For a complete list of hearings, volunteers should navigate to the Case Details Hearings tab. This is a view only section – editing is not available.

| Date ▼ | Time ▼ | Report Due ▼ | Location ▲ | Judge ▲ | Docket # ▲ | Hearing Status ▲ |
|----------|----------|--------------|---------------|------------|------------|------------------|
| 6/6/2018 | 11:45 AM | | Circuit Court | Judge Judy | | Held - Completed |

Services: Indicates a list of court-ordered services for the child and/or family member.

| Hearing Date ▼ | Type | Family Member Name | Specified Completion Date |
|----------------|------------------------|--------------------|---------------------------|
| 5/24/2018 | Educational Evaluation | Aquino, Rosa | 4/11/2020 |

Permanent Plan: This section shows the permanent plan(s) of the child to-date. This is a view only section.

| Hearing Date ▼ | Permanent Plan ▲ |
|----------------|------------------|
| 4/25/2020 | Reunification |

Closing Information: Displays information regarding case closure of the child only.

Child Placement – Closer View

The Placement location details can be viewed as shown below:

PLACEMENT DETAILS

[Back](#)

Placement

[Edit](#)

| | | | |
|---------------------|--------------------------|-----------|--------------------|
| Child Name | Noren, John | Address | 659 South Sycamore |
| Placement Facility | Taylor, Aunt Bea | Address 2 | |
| Hearing | | City | Terre Haute |
| From | 5/1/2015 | State | IN |
| To | | Zip | 48554 |
| With Siblings | N/A | County | Boone |
| Placement Type | Relative Foster Care | | |
| Placement Reason | | | |
| Reasonable Distance | <input type="checkbox"/> | | |
| In County | <input type="checkbox"/> | | |
| Notes | | | |

Petitions and Allegations – Closer View

The details of the **Petition** are shown below:


PETITION DETAILS

[Back](#)

Petition

Petition Number 62C01-1502-JC-000001
Petition Date 5/1/2015
Petition Type JC
Petition End Date

Petition Children

| Child | Action |
|-------------|---|
| Noren, John |  |

Displaying items 1 - 1 of 1

Beneath the **Petition** is the **Allegation** section. To view the details, lick on the **View** action icon and the following screen will appear.

ALLEGATION DETAILS

[Back](#)

Child : Noren, John

Allegations

| Allegation | Person Against | Negotiated Allegation | Outcome | Action |
|-----------------------------------|----------------|-----------------------|---------|--------|
| Neglect Or Abandonment, 31-34-1-1 | Noren, Mary | | | |

There will be a separate listing of each **Petition** to which the child is attached. In addition, there will be separate listings of **Allegations** to which the child is attached. It is possible to have multiple petitions (**JT, JD, GU, AD**, etc.) as well as multiple **Allegations** against one or more individuals.

Hearings – Closer View

A Hearing contains several sub-sections. To view Hearing details, select the View icon.

| Date ▾ | Time ▾ | Report Due ▾ | Location ▲ | Hearing Type ▲ | Judge ▲ | Status ▲ | Action |
|-----------|----------|--------------|---------------|----------------------------|----------|-----------|---|
| 7/10/2015 | 12:15 PM | 7/9/2015 | Circuit Court | Detention/Initial Combined | Roy Bean | Continued |  |

Displaying items 1 - 1 of 1

The Hearing details screen appears as shown:

| Hearing | |
|--|---|
| The Hearing Details screen shows: | Case Bumstead (2) - 00C01-1901-JC-000001/2 |
| The Hearing Date and Hearing Time | Hearing Date 4/25/2020 |
| A Docket Number | Hearing Time 9:30 AM |
| The Volunteer's Report Due date | Docket Number 3551 |
| The Location of the Hearing | Report Due 4/16/2020 |
| The current Hearing Status | Hearing Location Circuit Court |
| The name of the presiding Judge | Hearing Status On calendar |
| Dates when the Order was Filed and Received | Judge John Tipton |
| Any Notes pertinent to the Hearing | Order Filed 1/12/2020 |
| | Order Received 1/15/2020 |
| | Attorney Attended <input type="checkbox"/> |
| | Notes |
| | Both parents were present. Father was arrested at the conclusion of the hearing on an outstanding warrant. The DCS region director was present. |

The **Hearing Type** and **Outcomes** are indicated

| Hearing Types | Hearing Types | Hearing Outcomes |
|---------------|---------------|------------------|
| Type | Name | |
| Review | Continued | |

Additional Hearings details are shown by section:

Hearing Participants

Children

Family Members

| Name |
|-------------------|
| Bumstead, Blondie |
| Bumstead, Dagwood |

Volunteer Input

| Volunteer Name ▲ | Excused ▲ | Report Required ▲ | Recommends Accepted ▲ | Recommends Rejected ▲ |
|-------------------|--------------------------|--------------------------|-----------------------|-----------------------|
| Jones, Harry | <input type="checkbox"/> | <input type="checkbox"/> | | |
| Supervisor, Sally | <input type="checkbox"/> | <input type="checkbox"/> | | |

◀ ◁ 1 ▷ ▶

Court Ordered Services

| Type | Child Name | Family Member Name | Specified Completion Date |
|------------|---------------------|--------------------|---------------------------|
| Counseling | Bumstead, Alexander | Bumstead, Blondie | 4/27/2019 |
| Counseling | Bumstead, Cookie | Bumstead, Blondie | 4/27/2019 |

The **Hearing Participants** section displays the **Child** and **Family Member** for whom the hearing is/was ordered. This is **not** where the actual participation in a hearing is tracked.

The **Volunteer** input section shows indicators – the **Volunteer's Name**, if the **Volunteer** is **Excused** from attending, if a **Report** is required, if the **Volunteer's recommendations** are **accepted** or **rejected**, and an indicator if **recommendations** are **Negotiated**.

The **Court Ordered Services** lists the services pertaining to both a **Child** and **Family member** that have been ordered by the court. **Specified** and **Completion Dates** are shown.

Visitation

| Family Member | Child | Type | Specified Frequency | Actual Frequency |
|-------------------|---------------------|------------|---------------------|------------------|
| Bumstead, Dagwood | Bumstead, Alexander | Supervised | | |
| Bumstead, Dagwood | Bumstead, Cookie | Supervised | | |

Permanent Plan

| Child | Permanent Plan Type | Caseworker Permanent Plan Type |
|---------------------|---------------------|--------------------------------|
| Bumstead, Alexander | Reunification | Reunification |
| Bumstead, Cookie | Reunification | Reunification |

The **Visitation** section displays the type of visitation for a specific child that was ordered by the court along with **Specified** and **Actual Frequency** parameters.

The **Permanent Plan** lists each child and the associated **Plan Type**.

Optima GO - Overview

Optima GO is the mobile device version of Optima. It is not an “app” in the sense that it is not an application that’s downloaded to a device. Rather is it the Optima case management system reconfigured to fit within the confines of mobile devices so that basic functionality and viewing remain essentially the same as the personal computer version.

Optima GO - Log On to Optima – Using a Mobile Device

Open a browser (Safari, Firefox, etc.) and type in the URL / web address of your program:

Example:

<https://in-adams.evintosolutions.com>

The graphic below shows signing on to the “training” Optima database.



in-training.evintosolutions.com

Optima go

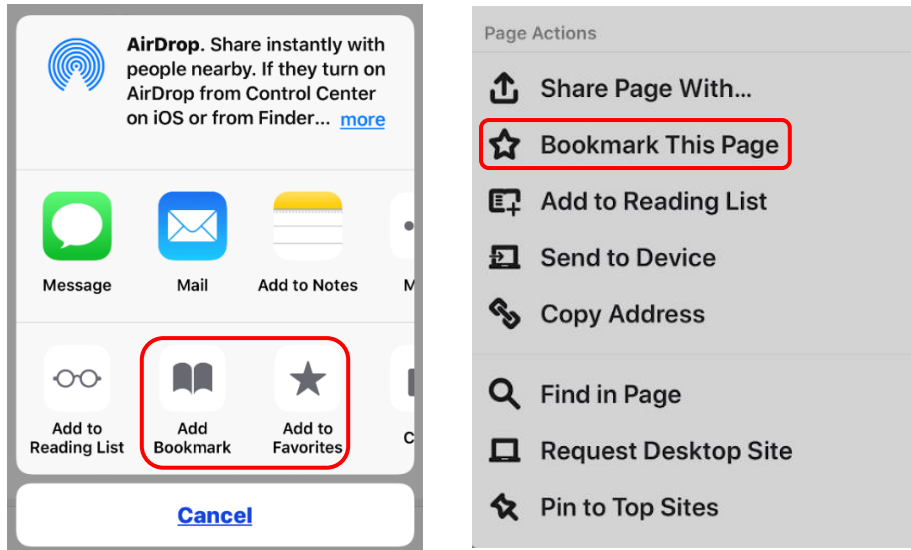
Username

Password

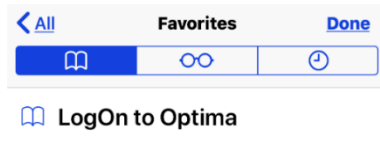
Login

<<---Go to Desktop Site--->>

After you have reached your program's Optima site, you may wish to SAVE the location as a BOOKMARK or as a FAVORITE on your device.



Type a name in your bookmarks of favorites that meaningful in finding the Optima icon.



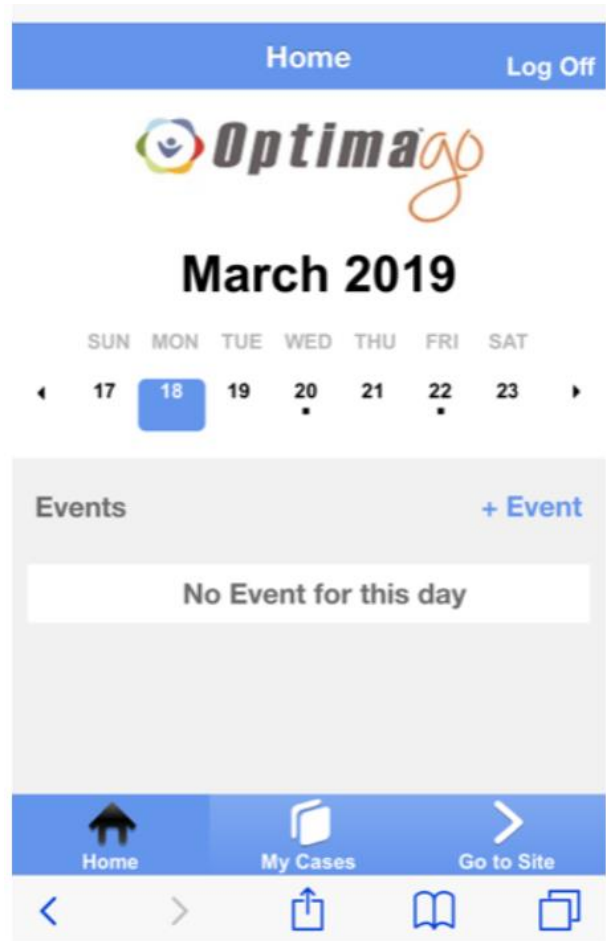
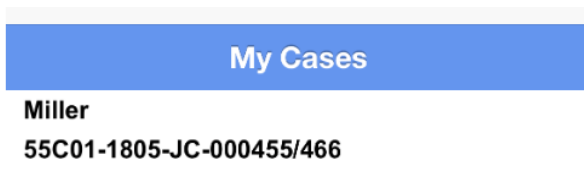
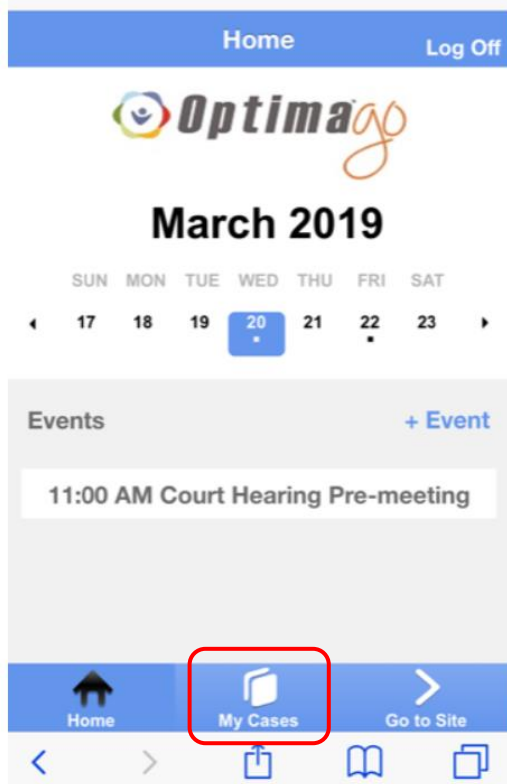
Type your **Username** and **Password** as shown and touch **Login**. This will initiate the mobile device version of Optima.

To go to the full Optima website, touch **Go to Desktop Site**.

A login form with three main components. At the top right is the OptimaGo logo. Below it is a text input field containing the username 'Dottie.Davidson'. Underneath that is a password input field represented by a series of dots. At the bottom is a large blue button with the text 'Login' in white.

Optima GO opens with the current week's calendar of events. This could include hearings or other events that have been added to the calendar. The dots underneath the days indicate an event. Touch the number and the event will display.

Below is an example of an expanded calendar event.



To proceed to the list of assigned cases, click **My Cases**.

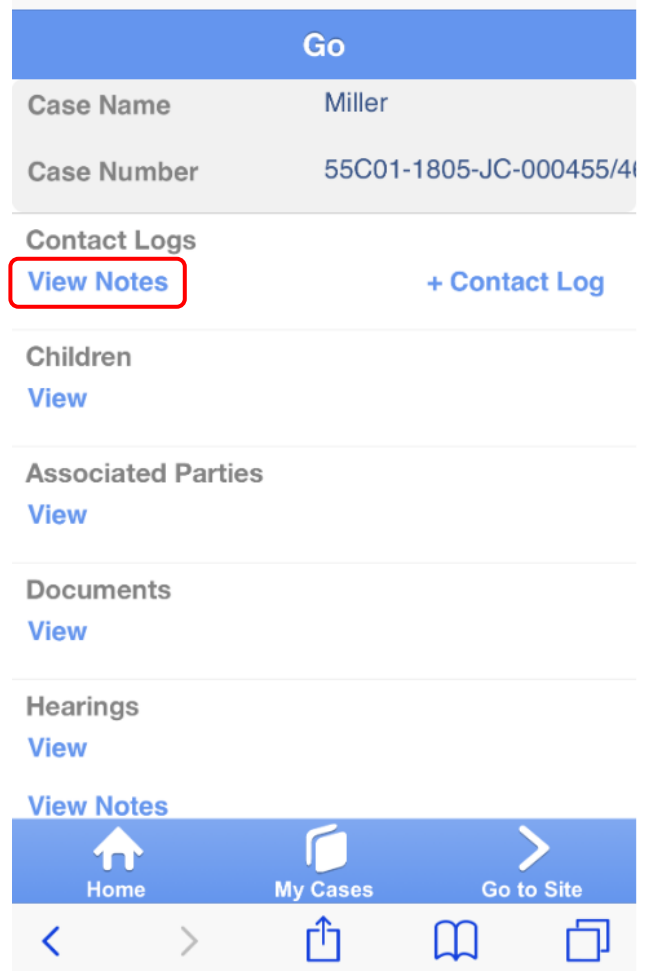
This screen will display the list of cases. To open a case, touch the case number.

Optima GO – Main Screen

This is an example of the **Main Screen** for a case. →

Any word or words that are highlighted in **bright blue** are active links to more information about the case.

For example, touch “View Notes” – and the screen will show approved contact log notes for the case.



Optima GO - View Notes



Date: 03/10/2019

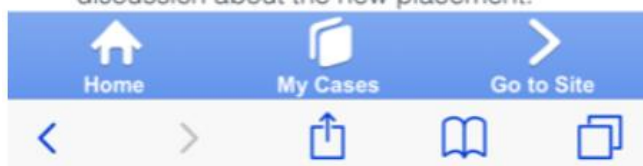
Activity Type: Child and Family Team Meeting (CFTM)

Contact Type: Face-To-Face

Submitted By: Davidson,Dottie

Subject: CFTM at the library

Notes: The meeting started 15 minutes late. DCS had to find a new location due to the weather. Jane and her sister brought the grandmother so she could participate in the discussion about the new placement.



←This display lists all of the components of this particular contact log.

To view additional lines of the “Notes” box, touch the body of the text and swipe up.

Optima GO – View Children

To view details of the various components, such as Children, Associated Parties, Documents, and Hearings and Notes, touch the word View under the heading.-->

[Optima GO – View Associated Parties](#)

[Optima GO – View Documents](#)

[Optima GO - View Hearings and Notes](#)

| View Children | |
|---------------|------------------------|
| Case Name | Miller |
| Case Number | 55C01-1805-JC-000455/4 |

Name: Miller, Tim

Age: 6

Birthdate: 05/25/2012

Gender: Male

Next Hearing Date:

Current Placement: 02/05/2019

Smith, Tom and Mary

Type: Non-Relative Foster Care

Placement Notes:

Family Members

[View](#)

[View](#)

| Home | My Cases | Go to Site |
|------|----------|------------|
| < | > | ↑ |
| | | 📖 |
| | | 📄 |

| Go | | |
|----------------------------|------------------------|------------|
| Case Name | Miller | |
| Case Number | 55C01-1805-JC-000455/4 | |
| Contact Logs | + Contact Log | |
| View Notes | | |
| Children | | |
| View | | |
| Associated Parties | | |
| View | | |
| Documents | | |
| View | | |
| Hearings | | |
| View | | |
| View Notes | | |
| Home | My Cases | Go to Site |
| < | > | ↑ |
| | | 📖 |
| | | 📄 |

← In the **View Children** window, information regarding the children's **placement** and **family members** can be displayed by touching View.

Optima GO – View Placement Facility
Optima GO – View Family Members

The View Placement Facility screen shows the details of the placement location.-->

| View Placement Facility | |
|-------------------------|------------------------|
| Case Name | Miller |
| Case Number | 55C01-1805-JC-000455/4 |
| Child Name | Miller, Tim |
| Facility Name | Smith, Tom and Mary |
| Supervisor Name | Smith, Tom |
| Phone | 317-694-8855 |
| Email | tomandmary@smith.org |

| Select Family Member | |
|----------------------|------------------------|
| Case Name | Miller |
| Case Number | 55C01-1805-JC-000455/4 |
| Child Name | Miller, Tim |

Name: Goodlady, Alice [View](#)

Relationship: Maternal Grandmother

Phone:

Email:

Name: Wilson, Teresa [View](#)

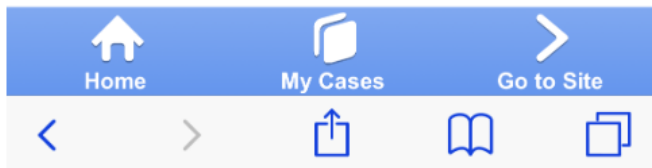
Relationship: Step-Mother

Phone:

Email:



←The Family Member screen shows basic information of a family member – clicking on View will expand the screen for more details.



Optima GO – Associated Party Details

| Select Associated Party | |
|-------------------------|------------------------|
| Case Name | Miller |
| Case Number | 55C01-1805-JC-000455/4 |

Name: Harwell, Harriett [View](#)

Association: Caseworker

Title: FCM II

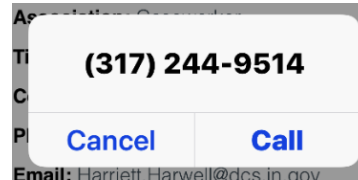
Company: DCS

Phone: 317-244-9514

Email: Harriett.Harwell@dcs.in.gov

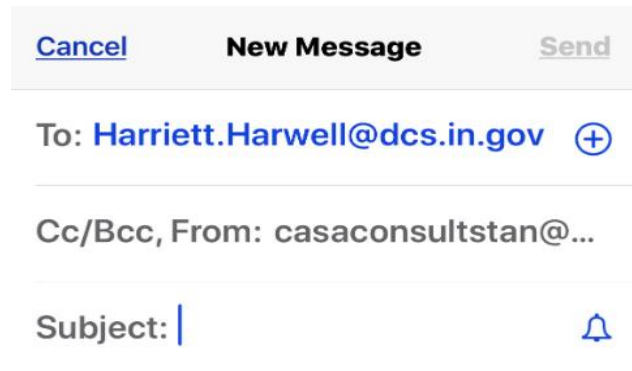
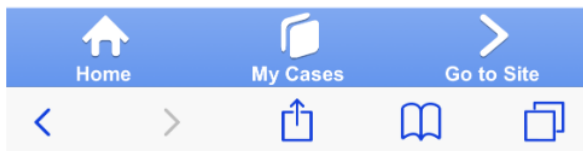
Children Assigned:

Miller, Tim; Miller, Tony



←Touching the phone number will initiate a phone call to the number shown.

←Touching the email address will initiate an email to the person.



Optima GO – Hearing Details

Below are examples of the Hearing Details screen views.

View Hearing

| | |
|--------------------|------------------------|
| Case Name | Miller |
| Case Number | 55C01-1805-JC-000455/4 |

Date
03/05/2019 11:30 AM




Report Due
mm/dd/yyyy

Hearing Types
Review

Hearing Outcomes
Concluded - Next Hearing Set

Docket

Home **My Cases** **Go to Site**

< >   

View Hearing

mm/dd/yyyy

Order Received
mm/dd/yyyy




Attorney Attended

Children

Family Members
Goodlady, Alice; Wilson, Teresa

Notes
The judge accepted all recommendations made by CASA. Everything else was uneventful. Next hearing will be sometime in June.

Home **My Cases** **Go to Site**

< >   

Optima GO – Contact Log – Adding

The first item to enter is the Activity Date – this is the date the event occurred. Touch the Activity Date and a pop-up selection appears at the bottom of the screen. Dates that are entered through Optima GO appear as a wheel – use a finger to swipe up or down to change the month, day or year. The red asterisk * indicates a required field.

| Cancel | Add Contact Log | Save |
|-----------------|------------------------|------|
| Case Name | Bumstead (2) | |
| Case Number | 00C01-1901-JC-000001/2 | |
| * Activity Date | mm/dd/yyyy | |
| * Activity Type | ▶ | |
| Subject | February 29 2017 | |
| | March 30 2018 | |
| Out of Court | April 31 2019 | |
| | May 1 2020 | |
| * Contact Type | June 2 2021 | |
| | July 3 2022 | |
| | August 4 2023 | |

Enter the Activity Type by touching the triangle to the right of the Activity Type text as shown. A selection wheel will appear at the bottom of the screen. When the correct activity is selected, touch Done.

| Cancel | Add Contact Log | Save |
|------------------------|---|------|
| Case Name | Bumstead (2) | |
| Case Number | 00C01-1901-JC-000001/2 | |
| * Activity Date | 05/01/2020 | |
| * Activity Type | Child and Family Team Meeting (CFTM)  | |

^ v AutoFill Contact **Done**

- Attempted/Canceled (visit, meeting,...
- Attorney Note-Work Product (attorn...
- Caseload Staffing (internal CASA st...
- Child and Family Team Meeting (...)**
- Collect/Read/Research Case Inform...
- Contact Biological Parent
- Contact Non-Placement: Relative, O...

Enter the Contact Type by touching the triangle to the right of the Contact Type text as shown. A selection wheel will appear at the bottom of the screen. When the correct type is selected, touch Done.

*Contact Type

*Hours

Mileage

^ v [AutoFill Contact](#) **Done**

** Entered by Supervisor for Volunteer

Email

Face-To-Face

Fax

Mail

Phone

Enter the number of hours, mileage and/or expenses as shown. Note – hours are entered in decimals with .25 as the minimum amount.

Cancel **Add Contact Log** **Save**

* **Contact Type**
Face-To-Face ▶

* **Hours**
2.5

Mileage
26

Expense

Notes
The meeting went very well. We talked a lot about the children and how the visits have been going

The Notes section is where the log notes of the event are entered. A sample is shown to the left. ←

Select the person(s) the contact log pertains to by sliding the selection button to the right – the selection button will change to a bright blue to show it has been selected. →

| Cancel | Add Contact Log | Save |
|----------------------|-----------------|-------------------------------------|
| Pertains to ▲ | | |
| F. Lee Bailey | Attorney | <input type="checkbox"/> |
| Harriett Harwell | Caseworker | <input type="checkbox"/> |
| Alexander Bumstead | Child | <input checked="" type="checkbox"/> |
| Cookie Bumstead | Child | <input checked="" type="checkbox"/> |
| Blondie Bumstead | | <input type="checkbox"/> |

If others were contacted, enter their name(s) as shown below

| Others Contacted |
|---|
| First Name Mary |
| Last Name Williams |
| Relationship Maternal grandmother |

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