



https://tx-galveston.evintosolutions.com/

Login with your provided credentials

Username: firstname.lastname

Password: 123456

The first time you login...

1. Change your password. Click “Change password” beneath your name in the upper right corner of the screen and choose a new password.
2. Update personal information by clicking “Personal Info”
 - a. Verify that all information is correct
 - b. Emergency contact – if none is listed, click the green “Add” button and input contact information for at least 1 person to contact in case of emergency
3. Return to the home screen by clicking “Volunteers Dashboard”

Welcome jane.doe
 Change Password | Log Off

Add

Volunteers Dashboard

Volunteers Dashboard | Help

Address Book | Personal Info

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

Case Number	Case Name	Petition Date	Action
XXCPXXXX	SMITH	1/1/2018	[Icon]

Displaying items 1 - 1 of 1

Cases Tab – View all active case assignments

Select a case to view by clicking the blue case number. This will open the Case Details page. This page displays information about the case including case assignments, children in case, current placements, and family members sections. It also is where contact logs, documents, and other information about the case is stored.

CASE DETAILS

Case Information

Case Number: 18CPXXXX
 Case Name: SMITH
 County: Galveston
 Jurisdiction:
 Priority Case?:
 Petition Date: 1/1/2018
 Notes:

Legal Status

Type	Date	End Date
TMC	1/1/2018	

Displaying items 1 - 1 of 1

Case Details Sections

- **Case Information** – View case number, case name, petition date, current legal status, and any notes.



OPTIMA TIP: Click this icon under the “Action” section to view more information

Case Assignments

Name ▲	Type ▲	Supervisor	Assigned ▼	Released ▼	Reason ▲	Contact Info ▲
Jones, John		<input checked="" type="checkbox"/>	1/1/2018			555-555-5555 john@casagalveston.org
Doe, Jane		<input type="checkbox"/>	1/12/2018			555-555-5555

1 Displaying items 1 - 2 of 2

- **Case Assignments** – You will already be listed on the case assignment section
 - Note the assigned date – this will be required information on a court report

Children in Case

Name ▲	AKA/Alias ▲	Gender ▲	Child Age ▲	Close Date ▼	Volunteer ▲	Supervisor ▲	Next Hearing ▼	Action
Smith, Mary		Female	5		Doe, Jane	Jones, John	2/10/2018	

1 Displaying items 1 - 1 of 1

- **Children in Case** – This section contains information about the child/children in the case
 - Click on the magnifying glass to view or add more information about the child, including language, any disabilities, and schools attended
 - Add new information by clicking the “add” button in the appropriate section.

Current Placements

Add

Name ▲	Placement ▲	From ▼	Reason ▲	With Siblings ▲	Contact Name ▲	Contact Info ▲	Action
Smith, Mary	Foster Home - Non-Relative	1/1/2018	Abuse/Neglect	None	Parent, Foster	555-555-5555	

1 Displaying items 1 - 1 of 1

- **Current Placements** – This section contains information about the child/children’s current placement(s) and the date placed
 - Click the magnifying glass to view more information about the placement
 - Past placements can be viewed in “Placement History” in the last section
- **Family Members** – View all known family members and their contact information.
 - Add family members by clicking the “Add” button

Family Members

Add

Name ▲	AKA ▲	Relationship ▲	Active ▲	Deceased ▲	Contact Info	Action
Brown, Ashley		Mother	<input checked="" type="checkbox"/>	<input type="checkbox"/>	555-555-5555 ashleybrown@gmail.com	
Smith, Mark		Father	<input type="checkbox"/>	<input type="checkbox"/>		

1 Displaying items 1 - 2 of 2

Contact Logs	To Do	Associated Parties	Documents	Petitions and Allegations	Hearings	Placement History
<div style="display: flex; justify-content: space-between; align-items: center;"> Add View Notes Search </div>						
Name	Type	Subject	Date	Hours	Status	Action
Doe, Jane	Education Contact	Request Grades	1/16/2018	.25	Pending	
Jones, John	Attended Hearing/Court	Adversary Hearing	1/16/2018	3	Approved	

➤ **Contact Logs** – Contact logs are a record of each contact you make regarding the case

- Click add to create a new contact log and include all required information:

Contact Log

Case Number: XXCPXXXX

Case Name: SMITH

Activity Date:

Activity Type:

Subject:

Out of Court:

Contact Type:

Hours:

Mileage:

Expenses: \$0.00

Notes:

(0 out of 5000)

Select	Contacted	Party Type
<input type="checkbox"/>	Lisa Gray	Attorney
<input type="checkbox"/>	Greg Black	Attorney
<input type="checkbox"/>	Jane Doe	CASA Advocate
<input type="checkbox"/>	John Jones	CASA Supervisor
<input type="checkbox"/>	Pat Blue	Caseworker
<input type="checkbox"/>	Amanda Green	Caseworker
<input type="checkbox"/>	Virginia Orange	Caseworker
<input type="checkbox"/>	Mary Smith	Child
<input type="checkbox"/>	Foster Parent	Foster Parent(s)

Others Contacted:

First Name:

Last Name:

Relationship:

First Name:

Last Name:

Relationship:

First Name:

Last Name:

Cancel
Create

- Person contacted
 - If they are already listed as an “Associated Party” (see below) they will appear in this box; check the box next to their name
 - If they are not an Associated Party, add their information in the field titled “Others Contacted”
- Activity date – date the activity occurred (note: it will auto-populate with TODAY’s date)
- Activity type – choose the type of contact from the drop down
 - Note: if you had a child and placement contact in the same visit, remember to create 2 separate logs (a child contact and a placement contact)
- Subject – description of the contact (ex: Monthly Visit)
- Contact type – choose the method of contact from the drop down (phone, email, face-to-face, etc.)
- Hours – record time spent travelling and during the contact in decimals (30 minutes = .5 hours)
 - Note: if you have multiple contact logs for one visit, you will only count the time once!
- Mileage, if applicable – if the visit was 5 miles away from your home, you would record 10 miles (5 miles to the visit, 5 miles back home)
 - Note: if you have multiple contact logs for one visit, you will only count the mileage once!
- Notes – be thorough and describe the contact. If it was an email, you can copy the content of the email into this field. Notes will be extremely helpful when composing a court report, and the more detail included the better!
- Supervisors also record all contacts made for the case in this section
- Use the Optima Contact Log Table for further information about recording contacts

Associated Parties – This section lists all individuals that have been identified as “associated” with this case

- They are the individuals listed on the person contacted box of the contact log - if you are consistently contacting someone and adding their information as “Others Contacted,” it is helpful to add them as an “Associated Party” – ask your supervisor for more information
- View this section to find contact information for attorneys, caseworkers and placement

➤ **Documents** – All documents related to the case are uploaded to the documents tab

- As soon as you are assigned you should be reading all documents, beginning with the oldest document (last page of documents) so that you see the oldest/first documents before the newer ones – click the magnifying glass to view the file
- Any documents you receive should be uploaded by you or your supervisor to this area (ex: IEPs, educational records, psychological evaluations, medical records, etc.). All documents should be destroyed after uploading.
 - Click “Add” to upload the file
 - Select the file type – ask your supervisor if you are unsure what type to select
 - Select the date of the document
 - Click “Save”

➤ **Hearings** – View list of all hearings for the case, along with when the report for that hearing is due and the type of hearing. **Court reports are always due 15 business days before the hearing**

➤ **Placement History** – View the child’s placement history, including placement type, date placed, date removed, and contact for the placement. This is included in the court report and very helpful for composing a court report

Volunteers Dashboard



Add						Total YTD Hours: 0	Total YTD Miles: 0
Complete Date	Training Topic	Hours	Mileage	Status	Action		

Training Logs Tab – View all in-service training hours accrued – you must have 12 hours each calendar year!

- Click “Add” to create an entry for each in-service completed:
 - Date training occurred (both schedule and complete date)
 - Training topic – select closest topic to your training
 - Ex: If you read a book, select book and record 1 hour for every 100 pages read (350 pages=3.5 hours)
 - Hours – record the number of hours spent in training
 - Mileage – record the number of miles travelled to attend (if any)
 - Notes – give more information – how was this training relevant?
- Click “Create” to save

In-Service Training

Schedule Date:

Complete Date:

Training Topic: << Select a Value >>

Training Format: << Select a Value >>

Trainer:

Hours:

Mileage:

Notes:

(0 out of 2000)



Address Book

Personal Info

Cases

To-Do List

Training Logs

Non-Case

Calendar

New Docs

Non-Case Tab – Record all non-case activity in this area (fundraising, office help, recruiting, speaking engagements, CASA events)

- Click “Add” to create an entry for each non-case activity attended
- Include this information:
 - Date activity occurred
 - Activity
 - Hours – record the number of hours spent on non-case activity
 - Mileage – record the number of miles travelled to attend non-case event
- Click “Create” to save

Non-Case Activity

Date

Activity << Select a Value >>

Hours

Mileage

Expenses \$0.00

Notes

(0 out of 2000)

New Docs Tab – If a new document has been uploaded to Optima and you have not viewed it, it will be visible in this section until you view the document

- All documents listed under “New Docs” will also be visible on the “Documents” tab for the specific case
- This is a useful way to make sure no documents are missed as they are uploaded

Tasks for new Optima Users:

- Login and change your password from 123456
 - * **Note: if you get locked out and cannot log in, do not click the “help” button. Contact your supervisor to have your password reset.**
- Add an emergency contact if one is not listed
- Update personal information
 - * Add your “CASA email” if it is not already listed
 - * If you have not created a dedicated email address, consider doing so. This is a good way to separate personal and CASA emails, and allows privacy of not giving out a personal email address
 - Gmail.com and Yahoo.com are good email server options
 - Advocates often use email addresses such as:
 - janedoe.casa@gmail.com
 - jdoe_casa@gmail.com
 - jd.casa@gmail.com
 - Be creative, but keep in mind that a shorter email address will be easier to remember
- Explore the database and get comfortable with where information is located
- View your assigned case
 - * Read all documents (beginning with the oldest document and finishing with the most recent)
 - * Review all associated parties
- Record time reviewing case in Contact Log as “Case research”
 - * Review the Optima Contact Log Table for details about recording contacts

Questions? Contact your supervisor for help with Optima.



Welcome jane.doe

[Change Password](#) | [Log Off](#)