

Optima Training Guide

Program

Optima is a web-based case management system developed exclusively for CASA and Guardian ad Litem Programs. Optima allows volunteers 24/7 access to their important case documents and information from any internet access point. It is a safe and secure way to upload and retrieve important documents, keep track of numerous case contacts, view a continuous history of child placements and schools, and enter case and child visitation notes. With Optima you now have the capability to eliminate the need for cumbersome case binders full of documents and records. Optima allows you greater control over information that is important. When the program attorney or the CAM uploads information, you will have immediate access to the information. You can also monitor and update your training and in-service hours towards recertification and keep track of your hours and miles for tax purposes.

Training

1. Go to our circuits home optima via the following link <https://fl-2nd.evintosolutions.com/>
2. Login in with your personalized optima account
 - a. Username: Firstname.Lastname
 - b. Initial system Password:123456
 - c. Make sure that volunteers have changed temporary password
 - i. Change your password using the link in the upper right corner of your screen, just below your user name.
3. Your "Home" button will always be the [volunteer dashboard]. Here you can find everything you need.
4. Click [Personal Info]
 - a. Here you can update personal contact information if it ever changes.
 - b. Double check if emergency contact is listed
5. Click the volunteer dashboard to return to "home."
6. Click [Training Logs]
 - a. Show how to add continuing education
 - b. Remind that continuing education does not need to start until the beginning of the next year (January 1st).
 - c. Volunteers are required to complete 12 hours of continuing education the year after their initial training
7. Click [New Docs]
 - a. Here you can find new documents uploaded to your case for your review
8. Click [Cases]
 - a. Click [case number]
9. Case Information Header

- a. Here you can find the original petition date, any significant notes , and the current legal status
10. Case assignments Header
- a. Find your attorneys, CAMs, and other volunteers contact information if applicable.
11. Children in Case Header
- a. Find the children in the case, their age, and the volunteer assigned to them (if multiple)
 - b. When you want more information click on the [magnifying glass]
 - i. Here you can find their birthday and geographical location
 - ii. Go through various headings
 - 1. Update [schools] placements throughout case
 - 2. [Placements] header shows placement history
 - iii. Click [Back] at the top left hand corner
12. Current Placements Header
- a. Start of placement, current caregivers name, and contact information
 - b. When you want more information click on the [magnifying glass]
 - i. Shows the current placements address
 - ii. Click [Back] at the top left hand corner
13. Family Members Header
- a. Contact information, relationship to the child, and contact information
 - b. When you want more information click on the [magnifying glass]
 - i. Shows the current placements address
 - ii. Click [Back] at the top left hand corner
14. Contact Logs header
- a. Click [add]
 - b. Discuss appropriate notation, type of contact types, and selecting appropriate parties
 - c. *Optima does not save notes automatically. Be sure to click [create] at the end of your note*
 - d. If you are a slow typer, create the note outside of the document and copy and paste it into optima. Optima will not create the note after it times out.
 - e. Need to edit the note before it is approved? Click the [pen and paper icon]
 - i. Click [view notes]
 - 1. To see all notes from newest to oldest from all members of the program
 - 2. Click [Back] at the top left hand corner
15. Click [associated parties] header
- a. Describe different parties. AALs, DCM, & Interested party.
16. Click [documents] header
- a. History of all documents from newest to oldest. Court orders, CBHAs, and others
 - i. Click [add]
 - ii. Select Document
 - iii. Select Document Type