

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 CBI 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.

Legend

**Volunteer
Dashboard**

This is your home page.



This is a direct link to a Contact Log entry from your Volunteer Dashboard. It also means you can edit something.



This is a link to look at something. Sometimes you can edit what you are looking at, and sometimes not.

Edit or Add

When you see these, you can add or edit something.

Optima does not automatically “remember” what you’ve entered. For every piece of information you enter, there will be a green **Create** or **Save** button. If you forget to click on either of those options after you have entered information, it will not be retained.

When you see colored text in these guidelines, it is the same color link in Optima.




Log-In Instructions

Optima works best when accessed with Chrome or Safari browsers.

Go to <https://fl-2nd.evintosolutions.com/> (consider bookmarking this site)

or

Go to <https://gal2.org/> and click on  **Optima** on the home page.

Your User Name is: Firstname.Lastname (ex. John.Doe)


If certified before June 2016, your initial Password is your date of birth in the following format: 00/00/0000 (ex. 05/18/1984)

If certified after June 2016, your initial Password is: 123456

Should you have problems logging in to Optima, please contact Laurie Williams at Laurie.Williams@gal.fl.gov or 850-606-1212.

Please change your password the first time you log in to Optima using the link in the upper right corner of your screen, just below your user name.

**Volunteer
Dashboard**

The first screen you will see is the . You can always return to this from anywhere in the case management system.



Case Management System Volunteer Guidelines

Address Book

- From the **Volunteer Dashboard**
- Click **Address Book**
- Click **Add**
- Enter case contact information
- Click **Create**

Please note that this is a user-specific feature and the entries you create in this Address Book are not viewable to other staff or GALs. This feature is a convenience feature for you to store various general contacts on your cases (daycares, doctors, service providers, etc.)

Personal Information

- From the **Volunteer Dashboard**
- Click **Personal Info**
- Under **Demographics**
 - Click **Edit**
 - Add or edit demographics
 - Click **Save**
- Under **Emergency Contacts**
 - Click **Add**
 - Add emergency contact information
 - Click **Create**
- Under **Employment**
 - Click **Edit**
 - Add or edit employment information
 - Click **Save**

This is where you can review and update your personal contact information. Please do not enter your Social Security number.

If you update your best email or your home address under Demographics, you must notify Susan Merritt at Susan.Merritt@gal.fl.gov

Please keep personal information updated.



Case Management System Volunteer Guidelines

Next to **Employment** click on **About**

Click on **General Preferences**

Click **Edit**

Edit General Preferences

Click **Save**

Click on **Skills and Interests**

Click **Edit**

Edit Skills and Interests

Click **Save**

Click on **Geo Location Preferences**

Click **Add**

Add Geo Location Preference

Click **Create**

Click on **Abuse Type Preferences**

Click **Add**

Add Abuse Type Preferences

Click **Create**

Click on **Disability Preferences**

Click **Add**

Add Disability Preference

Click **Create**

This is where you can review and update your volunteer advocacy preferences, such as the gender and age group of child, county you will accept cases in, and any abuse or disability preferences. If you don't have any preferences, you can disregard this page.

**Volunteer
Dashboard**

From the

[Cases](#) | [To-Do List](#) | [Training Logs](#) | [Non-Case](#) | [Calendar](#) | [New Docs](#)Click on **To-Do List**Click on **Manage Tasks**Click **Add**

Add Task

Click **Create**Click **Back**Click on **Training Logs**Click **Add**

Add In-Service Training

Click **Create**Click on **Non-Case**Click **Add**

Add a Non-Case Activity

Click **Create**Click on **Calendar**

Double Click on the date

Create new event

Click **Save**Click on **NewDocs**Click on the File Name or 

This is a list for you to notify your CAM that you plan to do something. Your CAM may also place tasks on your To-Do List.

Notice the Total YTD Hours:
And Total YTD Miles:
Your CAM will need to approve any training log entries.

This is for you to record any volunteer activity you perform for the Program outside of case activity, such as recruiting, board meetings, etc.

This calendar is for both you and your CAM to keep track of hearings, staffings, etc. Double click on the date of the event and complete the form.



NewDocs shows all of the recent documents uploaded to all of your cases. Open them here instead of going into the case itself. The documents stay in this tab for two weeks. The documents remain in the case itself for viewing later.


ADD CONTACT LOG

**Volunteer
Dashboard**

Click on [Cases](#) or the

[Cases](#) | [To-Do List](#) | [Training Logs](#) | [Non-Case](#) | [Calendar](#) | [New Docs](#)

Case Number	Case Name	Petition Date	Action
123DP456	Last, First	1/23/17	 

Click on  under [Action](#) for the case you would like to create a contact log entry.

Add the contact log information.

- Select activity type.

If the contact log is for a monthly visitation report, in the Notes section, state that the visitation report is in Documents. (You will learn how to do this later.)

- Indicate the subject.
- Indicate if the activity is out of court.
- Indicate the contact type.
- Add participants to the Contact Log.
- Enter the number of hours you spent.
- Enter your mileage and expenses.

Did you know your mileage and expenses for volunteer activities can be valuable tax deductions? Entering this information in your contact logs will allow us to generate a report totaling all of your miles and expenses for your GAL volunteer work.

This is the page you will use the most.

Contact Logs can be used to document any information or events about your case (child visits, staffings, hearings, school meetings, important phone calls, or emails are just a handful of other events which should be documented).

Use a Contact Log to document any activity or time related to your case work, such as reviewing documents or writing reports.

All child visits must be documented with a Contact Log.

Contact Log entries remain pending until approved by a supervisor. They can be edited until they are approved. Once a contact log has been approved the note is locked and can no longer be edited only viewed.

- Indicate who you had contact with.

The box in the upper right hand corner of the template is a list of people added to the case. If someone is affiliated with the case and not in that list, add them below the box. (You will learn later how to add people to this box.)

- Enter notes

Document your important observations and gathered information. Be concise. The information you enter should be case and child specific, relevant to the case, and objective. Contact logs are talk-to-text enabled. From your smart phone or tablet, you can dictate your notes into the Contact Log. There's no special setting. When the keyboard display pops up, touch the microphone icon and start speaking. Talk at a regular tone and pace but remember to turn it off when you're finished.


Click **Create**


CASE DETAILS

**Volunteer
Dashboard**

Click on [Cases](#) or the

[Cases](#) | [To-Do List](#) | [Training Logs](#) | [Non-Case](#) | [Calendar](#) | [New Docs](#)

Case Number	Case Name	Petition Date	Action
123DP456	Last, First	1/23/17	

Click on  under [Action](#) for the case you would like to view or edit

or

Click the [blue](#) hyperlink case number for the case you would like to view or edit

Case Information

No editing, only viewing



Case Management System Volunteer Guidelines

Case Assignments

No editing, only viewing

Children in Case

No editing in this section, but you can add information at the bottom of the page

Click on  under **Action** Scroll down to 

[Languages](#) | [Disabilities](#) | [Schools](#) | [Eligibility](#) | [Placements](#) | [Hearings Closing Information](#)

Click **Languages**

Click **Add**

Add Language

Click **Create**

Click **Disabilities**

Click **Add**

Add Disability Type

Click **Create**

Click **Schools**

IEP

Click **Edit**

Edit IEP

Click **Save**

School History

Click Add


Add School History

Click **Create**

Click **Eligibility**

No editing, only viewing

Click **Placements**

In **Placements** you can  and then edit an existing placement.

Click on  under **Action**

Click **Edit**

Edit **Placed With Placement Details**

Click **Save**

Click **Hearings**

No editing, only viewing

Click **Permanent Plan**

No editing, only viewing

Click **Closing Information**

No editing, only viewing

Click on **Back** to **CASE DETAILS**

Current Placements

Click **Add**

Add **Children Placed**

Add **Placed With**

Add **Placement Details**

Click **Create**

Family Members

Click **Add**

Add Family Member

Click **Create**

You do not need to enter a closing date on the prior placement entry. Once you create a new placement the system will automatically close the old placement and update the Placement History fields.

If a child is placed in a relative placement, that family member must be added to this field (in Associated Parties, which you will learn later) before the placement field can be updated.

On the **CASE DETAILS** section, go to the bottom of the page to reach the main menu.

[Contact Logs](#) | [To Do](#) | [Associated Parties](#) | [Documents](#) | [Petitions & Allegations](#) | [Hearings](#) | [Placement History](#) | [Case Closing Information](#)

[View Notes](#)

[Search](#)


ADD CONTACT LOG

Click on [Contact Logs](#)

Click [Add](#)

Add Contact Log

Click [Create](#)

Here is the list of your contact log entries. When you click on [Add](#), it will take you to the same page you reached from the  on the Volunteer Dashboard.

CONTACT LOG SEARCH

Click on [View Notes](#) (to the right) to view all the contact log entries and notes in [Case Information](#)

Click on [Back](#)

To perform a more specific search:

Click on [Search](#) (to the right) to SEARCH CONTACT LOGS

- Enter a date range
- Enter a start date and an end date
- Select preview

To export the information out of Optima into another format, select the Export to the Selected Format drop down menu and choose your preferred format. Format options include converting the report to a PDF or a Word document. Converting the report to a Word document allows you to cut and paste text into other Word documents or Monthly Visitation and Judicial Review Reports.

In addition to the basic date range search, the Contact Log Search report allows you to filter your search to pull more specific information by using four additional filters. To open these filters, deselect the box checked Null next to each filter.



Case Management System Volunteer Guidelines

- The Subject search filter allows you to search for keywords by searching the subject line of all contact logs.
- The Activity Type search filter allows you to search for information by a specific Activity Type.
- The Party search filter allows you to search for information related to a specific person identified in the contact logs.
- The Volunteer search filter allows you to search for contact logs entered by any GAL staff or volunteer on a specific case.

Use some or all of the filters; however, the more filters you use the more limited your search results will be.

Click on **Back** to the **CASE DETAILS** section.

Click on **To-Do List**

Click **Add**

Add Task

Click **Create**

Click **Back**

Click on **Associated Parties**

Click on **Manage Tasks**

Click **Add**

Click Attorney, and then Select Associated Party

Click Caseworker, and then Select Associated Party

Click Interested, and then Select Associated Party

Click **Save**

If you do not see your case manager listed, please contact your CAM and he or she will add the party to the database.

You can edit or release an individual from the associated parties tab by selecting the edit icon in the action column next to their name. There is also a notes field that adds any additional information such as concerns or observations about the individual.

Click on **Documents**


Click **Add**

Add Document


Click **Save**

Important: The document you upload must be saved to your device before it can be added to Optima. Once a document has been uploaded, it cannot be edited in any way. Please make sure you name your document before uploading. Be specific! For example, if you are uploading attendance records you may want to title the document "Attendance records – child's name." Please do not upload anything and simply call it records.


Click on **Petitions and Allegations**

No **Add**, but you can 

Click on **Hearings**

No **Add**, but you can  at Hearing Details, Types, Outcomes, and Participants, Volunteer Input, Court Ordered Services, Visitation, and Permanent Plan

Click on **Placement History**

No **Add**, but you can  and then edit an existing placement.

Click on  under **Action**

Click **Edit**

Edit **Placed With Placement Details**

Click **Save**

**DO NOT UPLOAD YOUR
CHILD VISITATION REPORT
WITHOUT CREATING A
CONTACT LOG.**

To create an attachment from your child visitation report email, follow these guidelines:

- For individuals accessing their email through a web browser on a traditional computer, the popular [Google Chrome](#) browser has a built-in "Print to PDF" option on the print menu.
- On Android mobile devices, the [Cloud Print](#) app can be used to generate PDF files from Google Chrome.
- On Apple mobile devices, the [Google Drive](#) app can be used to access Google Cloud Print from Google Chrome.
- For individuals accessing their email through a client application on a traditional computer, several vendors offer free Print to PDF software.
- On Windows, [PDF-XChange Lite](#) is free for non-commercial use. I am currently using this Print to PDF printer.
- On Mac OS, Print to PDF is a [built-in feature](#).

Optima is an online, secure system with a lot of confidential information. **Please be sure to log off of the system (scroll to top of screen to find link in upper right corner) when finished.**