OPTIMA TRAINING
For use in UMCHS (OR)

Updating Personal Information

Volunteer Dashboard:

1. Select "Personal Info".

   Demographics section:

   a. Select "Edit" to update personal information.

   Emergency Contacts section:

   a. Select "Add" to enter a new emergency contact.
   b. Select the "Edit Contact" action icon to update an emergency contact.

   Employment section:

   a. Select "Edit" to update current employment information.
   b. Please do at least the first two dropdown items!

   About section:

   a. Select "Edit" to update case selection preferences.

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Using the Address Book

Volunteer Dashboard:

1. Select "Address Book".
2. Select "Add".
3. Enter the contact information for a person.
4. Select "Create".
5. Use this for NON-CASE References and Resources.

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There are 6 tabs, the first 2 are your ADVOCACY Tabs and the second 2 are your PROGRAM tabs, and the last two are Informational: Calendar and New Documents!

CASES and TO DO help you find and do your advocacy work

Entering a Contact on a Case

Cases tab:

1. Select the "New Contact Log" action icon.
2. Enter the Date of the contact.
3. Select the Activity Type and Contact Type from the drop down lists.
4. Enter a Subject, if appropriate.
5. Enter the Hours spent on the activity.
   For 15 minutes, enter .25 (hours),
   For 30 minutes, enter .50 (hours),
   For 45 minutes, enter .75 (hours).
6. Enter Mileage and Expenses, as needed.
7. Check the boxes of people who were directly contacted. If they do not appear in the contact list, enter them as "Others Contacted".
8. Enter Notes of the contact.
9. Select "Create".

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Updating Case Information

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Updating Child Information on the Case

Children in Case section:

1. Select the "View Child" action icon for the child you want to update.
   Languages, Disabilities and Schools tabs:
   a. Select the appropriate tab.
   b. Select "Add".
   c. Select a value from the drop down list.
   d. Select "Create".

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Adding a Placement to the Case

Current Placements section:

1. Select "Add".
   Children Placed section:
   a. Select the appropriate child(ren) who were placed.

   Placed With section:
   a. Select where the child was placed: at a Placement Facility, with a Family Member or Interested Party (includes Foster Parents). You will only select one option.

   Placement Details section:
   a. If placement was determined during in a hearing, select the correct Hearing from the drop down list. If not, skip it!
   b. Enter the Placement "From" date. An open "To" date signifies the current placement for the child. (So, don't put anything there!)
   c. Select "With Siblings" and the "Placement Type", which are required.
   d. Enter other Placement information, as known.
2. Select "Create".
3. You do not have to close an old placement first. Optima will do that automatically for you!

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Adding Family Members to the Case

Family Members section:

1. Select “Add”.
2. Enter the contact information about the family member
3. Update any checkboxes, as requested by the program.
4. Select “Save”. This will give you more options on the next screen, at the bottom.
5. On the Relationship tab, identify the child or children for whom this is a family member, and select the appropriate type from the drop down menu.

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Adding Associated Parties to the Case

Associated Parties tab (located at bottom of the Case Details):

1. Select "Add".
2. Choose the type of person you want to add: Attorney, Caseworker or Interested Party.
3. Select the name of the associated party from the drop down list
4. Select "Save".
5. Fill in each field as appropriate, being sure to add First and Last Name.
6. Select "Create" (which will display Child and Family Member sections).

Child section:

a. Select "Add" to enter the start date of the person's assignment/relationship with the child(ren) in the case.
b. Check the box next to the appropriate child(ren).
c. Enter the Assigned Date.
d. Select "Create".

Family section:

a. Select "Add" to enter the start date of the person's assignment/relationship with the family member(s) in the case.
b. Check the box next to the appropriate family member(s).
c. Enter the Assigned Date.
d. Select "Create".

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Releasing an Associated Parties from the Case

Associated Parties tab (located at bottom of the Case Details):

1. Select the magnifying glass to the right of the person to be released.
2. Select the edit icon by the name of the person from whom you are releasing the Associated Party.
3. Enter a Release Date and a Release Reason.
4. Select "Save".
5. Repeat as needed for additional children and family.

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Uploading Documents to the Case

Documents tab (located at bottom of the Case Details):

1. Select "Add".
2. Choose the file to be uploaded.
3. Select the Document Type from the drop down list.
4. Update the Upload Date is necessary.

The Documents Tab is set to allow documents that are 5MB (7000kb) or smaller. Documents larger than this cannot be uploaded. If you have a document too large to be uploaded there are two (2) main options:

1. A document can be split into two separate documents and upload as "part 1" and "part 2". Some programs prefer to do this to make it easier to scroll through a document. It is easier to look through 10 pages than 20 pages.
2. Many times, documents are scanned and sent in their largest resolution. While this is great for images, it is hardly necessary for a document. Try setting your scanner resolution to a lower setting. For best results, and faster uploads, please scan your documents using the B&W setting on your scanner (no color), and a lower resolution setting (200dpi is ideal).

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Adding a Hearing to the Case

Hearing tab (located at bottom of the Case Details):

1. Select "Add".
2. Enter the appropriate fields. Date and Time are required.
3. Select "Create" (which will display additional tabs and sections):

   Hearing Types tab:
   a. Select "Add".
   b. Select a value from the drop down list.
   c. Select "Create".

   Hearing Outcomes tab:
   a. Select "Add" to enter Outcomes if the hearing has concluded.
   b. Select a value from the drop down list.
   c. Select "Create".

   Hearing Participants section:

   Children tab:
   a. Select "Add" to enter the Child(ren) discussed in this hearing.
   b. Select a value from the drop down list.
   c. Select "Create".

   Family Members tab:
   a. Select "Add" to enter the Family Members discussed in this hearing.
   b. Select a value from the drop down list.
   c. Select "Create".

   Volunteer Input, Court Order Services, Visitation and Permanent Plan sections:
   a. Select the appropriate tab.
   b. Select "Add".
   c. Select a value from the drop down list.
   d. Select "Create".

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Creating To-Do Tasks

To-Do List tab:

1. Select "Manage Tasks", if you are adding a task from your Volunteer Dashboard Tab.
2. Select "Add", if you are adding a task from inside the case on the To Do Tab.
   a. Select a Case from the drop down list, if the task is case-related.
   b. Select a Hearing from the case, if the task relates to the hearing.
   c. Select a task Category and Service Type for the task.
   d. Enter a task Description.
   e. Select "Create".

      Task Assignment section:

      i. Select "Add".
      ii. Select your name from the Assigned To drop down list.
      iii. Enter the Assigned Date, Due Date and select the task Priority.
      iv. If the task is case-related, select the Children, Family Members or Associated Parties to whom the task relates.
      v. Select "Save".

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The next 2 tabs are for capturing the work you do for the PROGRAM:

Adding a Training Log

Training Logs tab:

1. Select "Add".
2. Enter the Scheduled Date and Completed Date of the training.
3. Select the Training Topic, Training Format and Trainer from the drop down lists.
4. Enter the Hours spent on the training activity.
   For 15 minutes, enter .25 (hours),
   For 30 minutes, enter .50 (hours),
   For 45 minutes, enter .75 (hours).
5. Enter Mileage, as needed.
6. Enter a detailed narrative of the training into the Notes.
7. Select "Create".

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Entering Non-Case Volunteer Activity

Non-Case tab:

1. Select "Add".
2. Enter the Date of the non-case activity
3. Select the Activity from the drop down list.
4. Enter the Hours spent on the activity.
   For 15 minutes, enter .25 (hours),
   For 30 minutes, enter .50 (hours),
   For 45 minutes, enter .75 (hours).
5. Enter Mileage and Expenses, as needed.
6. Enter a detailed narrative of the activity into the Notes.
7. Select "Create".

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The final 2 tabs are the INFORMATION tabs:
There is no actual work you do here. This simply provides you information, like what is on your calendar and any new documents that have been uploaded into the system within the past 14 days.

The calendar will populate with events like your hearings, report due dates, etc. from your case. These happen automatically; there is nothing that needs to be done.

You can add your own events directly to the calendar by double clicking on a day. This will open a new window were you can enter the event, time and notes.

The Optima Calendar will not sync with outside calendars, apps, etc. This is the fastest way to introduce viruses, malware and malicious programs into a database, so this is not allowed, nor planned as a feature in the future.

A document will be considered "New" for the first 14 days, and then will no longer appear in the New Docs tab, but will always be available in your Documents tab in the case.

Changing your Password
Passwords should be updated every 90 – 120 days. Although Optima will not force you to do this, or require the change, it is a best practice.

Changing a password:

1. At the top right of the screen, directly beneath your user name, select the "Change Password" link
2. Enter the appropriate information into each field.
3. Note the requirement for your password based on your specific program's requirements.
4. If your password and confirmation password do not match, Optima will let you know. Correct the error by retyping both entries.
5. Select the "Change Password" button at the bottom left.
6. Optima will let you know the password has been successfully changed.
7. Use the "Volunteer Dashboard" button to return to the home page, or the "Log Off" link to end your Optima session.