OPTIMA TRAINING – NEED TO KNOW
For use in
CASA of Central Texas (TX)

**Website: https://tx-central.evintosolutions.com**
**User name: firstname.lastname**
**Check your e-mail for the default password!**

## 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.

## 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.

**TABS - There are 6 tabs: the first 2 are your ADVOCACY Tabs, the second 2 are your PROGRAM tabs, and the last two are informational (optional).**

**CASES and TO DO help you find and do your advocacy work. After being assigned a case, please allow for one month for your case to be added to the system.**

MOST IMPORTANT TAB IS CONTACT LOGS, which is where you will be inputting your time and mileage for case work (so no need to do a separate timesheet)!

**Entering a Contact on a Case**

Cases tab, click your case, and scroll down until you see the Contact Logs tab:

1. Select the green "Add" button.
2. Enter the Date of the contact.
3. Select the Activity Type (see examples below) 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), and so on…
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."

Activity Type Examples (ALL INCLUDE DRIVE TIME):

- Courtroom Advocacy – attendance at court hearings, including time spent waiting for case to be heard
- Court Reports/Documentation – gathering documentation (including reading CPS report) and writing court reports
- Documentation – correspondence or notes regarding case-related updates to CPS, AAL, parents' attorneys, etc. **(THIS IS THE CATCH-ALL ACTIVITY TYPE.)**
- Education Advocacy – contact with school, attendance at school meetings (e.g., ARD)
- Medical Advocacy – contact with doctors/therapists, reading medical records or therapy notes
- Permanent Placement Research – includes family finding, parent interviews, any permanency-related meetings (e.g., Family Group Conference, Permanency Conference, mediation)
- Supervision with CASA staff – includes either in-person meetings or phone calls/emails regarding case-related updates
- Visits to Child/Foster Family/Relatives – includes phone calls/emails/texts

**For calculating time for the multiple emails, phone calls, and texts you make and receive, it may be best to estimate the total communication/documentation time within one week at the end of the week. For example, if you send and receive several short emails multiple times within a week, calculate the estimated time for that whole week (ex: 1.25 hours) into one day (last day of your contact for that week).*

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

SECOND MOST IMPORTANT TAB IS TRAINING LOGS, which is where you will be inputting your Continuing Education hours (so no need to do a separate timesheet)!

## 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 (DO NOT INCLUDE DRIVE TIME).
   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 the title and/or link and a detailed narrative of the training as it relates to your advocacy into the Notes box. If you receive a certificate, please do send to Layla at lcoleman@casacentex.org.
7. Select "Create."

## 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."

***Drive time for CEs is to be recorded in non-case activity, not in the training log.***

*To record drive time to and from CEs, go to Volunteers Dashboard and click Non-Case tab. Click Add and enter in activity as "Other – Drive Time for CEs."

Also of note in this non-case activity section is that if you are involved in our Wing Society (assisting with community outreach and social events), fundraise for CASA, or attend advocate functions, you can also record your time and mileage here.

Please contact Layla Coleman at lcoleman@casacentex.org for any questions.