

## Optima Refresher

Most of you are pros at entering Contact Logs and we definitely use your Contact Logs to help develop Advocacy Plans for your cases and in helping you with finishing court reports. Below are some questions that we get asked regularly or things that we are making us have to deny contact logs or contact you to revise prior to approval. Please take a look at the Frequently Asked Questions to refresh your Optima skills. We'd love to hear from you if you have questions that are not covered below. Please email your supervisor with any questions so those can be addressed at a future date.

### **Is the “Activity Date” the day that I enter the Contact or the day the event took place?**

*Use the date that you made the contact; this assures that there is an accurate record of when the activity took place.*

### **Do I choose “Child Contacted” as Activity Type if I see other people during a visit?**

*Yes. Remember our goal is to create “child focused contacts”, so always select that for any activity the child was present for. Remember to reflect others that were present by checking their name or by typing in their name in the “Others Contacted” and put their relationship to the child. Your notes should reflect things specific to the child any time you see the child. You can also indicate what the setting of the meeting is in our notes or in the “Subject” Tab.*

### **Do I always have to put something in the “Subject” Tab?**

*Yes, this is a very important reference for supervisors in providing adequate supervision regarding your contacts and it will be extremely beneficial to you when you are reviewing your notes to prepare for writing your court reports and preparing for testimony. Keep it simple; “Attended Court Hearing”, “FTC”, “School Visit”, “Scheduled Visit”, “Provider Update”, etc.*

### **Is it mandatory to check the contact type each time?**

*This tab is very important for recording time and to assure that our children have “Face to Face” visits with their CASA.*

### **Do I put .25 even if my contact did not take 15 minutes?**

*Yes, when Optima calculates time it uses the increments of .25, .50, 1.0, etc. It will accept different increments, but the time will not be calculated as time spent for the month on our case.*

### **What do I need to include in the “Notes” section?**

*Record all of the information that you learned in the visit; there can never be “too much” information included in the notes. Please begin the note with the location of the visit if it is a “Face to Face” contact and include things like the condition of the home and who was present. Do a separate paragraph for each child and things that you observed or what you talked about that is specific to each child. Avoid vague statements such as “child is doing well” and “child is adjusting well”. Put the things that you observed that*

cause you to believe that to be true. You should write your notes in a manner that anyone can follow and understand what is going on in the case.

### **Do I have to check everyone that I saw during the visit in the “Contacted Box”?**

*It is important to have a record on everyone for each contact. You should type in anyone that is not in the “check off list” in the “Others Contacted” section. If you are recording contacts with your supervisor, please type his or her name in that section so there is a record of which supervisor assisted you.*

### **I keep forgetting to check the “Out of Court” Box, is that really important?**

*That box needs to be checked for any and all activities that take place outside of court. This box enables Optima to track how much time you are spending in court and out of court working for your kids.*

### **Why do some of my contact logs get “Denied”?**

*Your supervisor may deny your contact if the information is vague or not child focused. Other denial reasons may include not checking who was present in the “Contacted Box”, stating that you contacted someone and asked a question but not listing what you learned, the time entered not being in proper increments or not matching the information in the notes section, no notes, or notes that are not clear.*

### **What do I do if my contact log is denied?**

*Your supervisor will give you feedback on what corrections need to be made. Sometimes if it is a “minor fix”, the reason will be noted in bold at the bottom of your notes. Select the icon that looks like a piece of paper with a pen, make your corrections, and re-submit.*

### **I keep forgetting to choose “Create” after I make an entry and it “disappears”. Can a supervisor retrieve that entry?**

*Unfortunately, we cannot do that. Please remember to choose “Create” to avoid having to repeat your work.*

### **When are Optima entries due?**

*You should enter any activity into Optima as soon as possible after you complete the activity. This assures that the details are accurate and allows your supervisor adequate time to review and give you quality supervision. End of month reports are started on the 25<sup>th</sup> of each month. It is necessary for you to schedule your visits and enter all contact logs prior to the 25<sup>th</sup>.*

### **Why does Optima ask me for my mileage and should I enter something if I am not asking for mileage reimbursement?**

*Optima records total miles for each case by each advocate. This is a number that we like to calculate and we can also use that to tell you how much mileage you have regarding your service as a CASA. If you don’t know, please estimate using a city to city Mapquest or Google search. Don’t leave that tab blank, enter “0” if you don’t know or the contact was a phone or email contact.*