

Optima Notes and Communication with Your Supervisor

Why Is This Important?

It seems that one of the most frustrating things for CASA Volunteers and Advocate Supervisors is the paperwork. Most of our CASA Volunteers go above and beyond the call of duty in visiting their assigned children, getting case updates from DCFS, observing parent visits, talking to parents about their progress, getting school reports, getting provider reports, and all of the many job duties of monitoring your CASA case. You also do a great job in keeping us (the Advocate Supervisors) informed and discussing what action steps are needed to further advocate for the children you are assigned to. We are, however, having some breakdowns in getting the necessary documentation back to us in your monthly Contact Logs and getting those logs submitted in timely manner. The following information will provide you with insight regarding exactly what we need to capture, why we need the information, and some tips to keep you on track with keeping the notes necessary to complete your final report.

What information needs to be reported to your supervisor via Optima Contact Logs?

- What dates I saw the child or children to whom I am assigned, how much time was spent with the child (per child), and a brief summary of the visit.
- Where you met with the child; school, foster home, court, DCFS Office, etc.
- The dates and amount of time for phone contacts with your CASA child, if applicable.
- A list of anyone else that you met with regarding your CASA child, the date that you met with that person, and how much time that you spent with that person. Examples of people that you may meet with would be foster parents, parents, counselors, teachers, DCFS personnel, etc. A detailed summary of what was discussed and any other pertinent information should be included.
- The dates of any phone contacts with other parties and a detailed summary of what was discussed.
- The dates and time spent on any and all contacts with your supervisor as well as a summary of your discussion.
- Please list your attempts to reach a significant person in your CASA child's life. We have the new "Attempted Contact" as one of our Activity Types. This keeps a record of our efforts to reach people even if we don't actually make the contact.

Why does my supervisor need all of this information?

- Your Contact Logs document the great work that you do and provide documentation that the work was completed by you.
- The Contact Logs keep the case file updated with current information regarding your assigned child, and supervisors refer back to these reports when assisting you in drafting your court reports.
- Accurate case documentation drives outcomes!

- Your Contact Logs are first hand reports regarding your specific child. If for some reason you cannot see your child for one month, your reports give the supervisor information to assure that the child has advocacy during your brief absence from the case.
- Your Contact Logs assure uninterrupted support for you when your Advocate Supervisor is out of the office. If your supervisor is unavailable, another supervisor can review your logs for case history and provide support to you when necessary.
- Your Contact Logs will be a great asset to you when writing court reports and knowing what information is still needed when beginning your court report.

Some tips on how to keep up with all of this information:

- Keep very detailed notes after each contact. This does not have to be “fancy”. Log your contacts in Optima within 48 hours of the event. Your memory of the contact will be diminished if you wait to do all of your Contact Logs at the end of the month.
- Review previous Contact Logs to assist you in planning your next month’s advocacy plan.

Please make sure that your Optima Login and Password are protected. Please do not save the password to your device so that others cannot log in if they happen to have access to that device.

Your Advocate Supervisor is available to assist you in any way and can share some great note taking methods that are being utilized if you are struggling in this area. Please remember that all case activity needs to be completed and documented in Optima no later than the 25th of each month.