Advocate Refresher: Best Practices for Optima Contact Logs

Documenting contacts in Optima is an essential function for CASA Volunteers and CASA Advocate Supervisors. While this task may feel like it is just one more thing on our "CASA To Do List", contact logs are utilized to assess permanency, provide advocacy, and are the foundation of CASA Court Reports. Gathering information and making fact based observations at visits are the research portion of our advocacy and court report writing.

Below are some tips as it relates to this important CASA responsibility:

- Complete your log as soon as possible after the contact. Ideally, the contact should be documented on the same day but at a minimum, documentation should be done within 48 hours of the visits. The information will be fresh in your mind and will save the stressful situation of trying to remember everything at the end of the month when your advocate supervisor is gently reminding you to document all of your contacts.
- Describe what you see and hear versus the emotions that you believe children or adults are displaying. An example would be writing "I saw the child smile and run to his mother for a hug during their visit" versus "The child was overjoyed to see his mother".
- Be sure to note any concerns in an objective manner. If we are concerned that a parent may be actively using drugs, document this by writing what you saw. For instance; document "Ms. Smith kept dozing off during the visit and her speech was slurred" instead of "Ms. Smith appeared to be under the influence".
- Avoid labeling a child or parents behavior and simply say what you saw or heard. Descriptive words are not necessarily fact based. If you saw the child throw food, kick his brother, and spit at the foster parent, write that versus saying the child's behavior was bad. If you do happen to observe an interaction such as this on a visit, there should be documentation of how the caretaker responded to the situation.

CASA Supervisors utilize the logs to guide advocacy plans and assist in facilitating services for our CASA children. Case notes are useful in monitoring court orders and services for our children and families. Documenting the information provides both advocates and Advocate Supervisors with a snapshot of what is needed, what is being provided, and what we need to advocate for.

Maintaining fact based and current documentation is necessary when drafting our court reports. Reading through the case notes allows you to consider all of the information gathered versus relying on memories of the most recent contacts. We often have six months of information to consider when developing our recommendations for court.

Last, but certainly not least, if your contact logs are current and documented in a fact based manner, writing court reports will be much smoother. The research will have been conducted and documented in a way that is easy to bring into the court report. As always, speak to your supervisor if you need more support as it relates to this crucial job. Your work is much appreciated and we are here when you need our assistance.