

Optima: Why Bother? Recap

Tips & Tricks

- **New information after conference: to allow volunteers to add associated parties – edit Volunteer Configuration; Lookup Tables > Volunteers > Volunteer Configuration; FOUR additional levels of security allowed for volunteers include 1) Add Hearings, 2) Add Family Members, 3) Add Associated Parties, and 4) Delete Case Documents**
- Allow Contact Logs to be edited for a longer period of time by the supervisor by editing the Volunteer Configuration (under Lookup Tables > Volunteers)
- Host Optima “drop-ins” via Zoom
- Use “box expander” in bottom right corner of any Notes field to expand while using
- Use Notes under Case Information to post high level review of case and current goal in the absence of a dashboard overview for cases
- Add “Report Filed” as a Hearing Status (in addition to “Held” and “Continued”) to quickly see which cases are filed; West Central created ad hoc report to use this field
- Use “View Notes” button on Contact Logs and Hearings to see all data at once, rather than opening each entry individually; use ^F to find specific text
- Copy any notes to clipboard before saving, in case a timeout has occurred; while cursor is in Notes field, ^A selects all text, ^C copies highlighted text
- Additional keyboard shortcuts: ^X to cut, ^V to paste
- For lengthy notes, create document and upload in Documents; in Contact Log state “see document”
- To spell check, load an external spell checker through Internet browser
- Access Optima offered training (free w/ subscription) through Help >> Optima Training
- Record (typed or spoken) in email, Word, etc.; copy and paste into Notes; avoids timeout issue and uses existing spell check options

Issues to share with Optima team:

- System times out when user spends too much time typing in “Notes” so loses data when clicks to save
- No ability to preview docs before downloading; need to be able to preview without downloading when not on a secure device
- 5000 character limit for Notes on Contact Logs is too small
- When cut and paste series of emails into Contact Log Notes, receive error message due to email addresses embedded in text
- Allowed document size is too small; most service plans need to be reduced to multiple files
- No real “app”; doesn’t seem like “confidentiality” is a good reason as things like banking have confidential info, too
- When change supervisor on a case, does not automatically change contact log approval, and since no automatic notification (only supervisor dashboard) any unchanged supervisors go unnoticed for period of time
- “View Notes” button for Hearings is not available to Volunteers, only Supervisors
- Thank you Robert for all that you do!