



Optima: Why Bother?

2023 ILLINOIS CASA ANNUAL STATE CONFERENCE

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**CHANGE A
CHILD'S STORY.™**



Who's Here Today?

- Presenters
- Programs
- Volunteers
- Staff



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Tackling Optima Today

- How & Why We Use Optima
- Barriers
- Data Task Force
- Contact Logs
- Tips and Tricks
- OptimaGo



Optima™

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How Do We Use Optima?

- Contact Logs
- Documents
- Training Logs
- Contact and Location Information
- Associated Parties
- Hearings



**Volunteers
Dashboard**

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Why Do We Use Optima?

- Single place to store and retrieve info
- Communication between CASA and Supervisor
- All updates in one location
- Track info for Program management
- Protect the Program

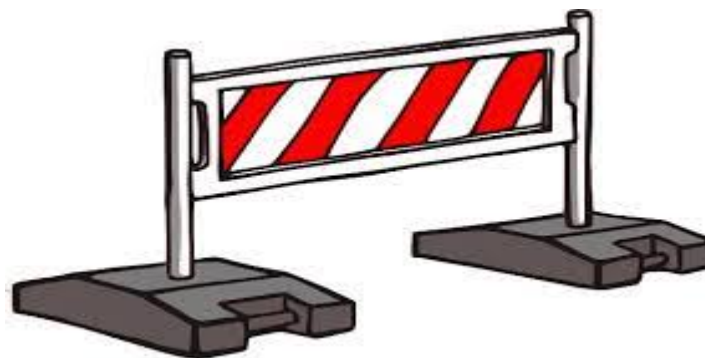


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Barriers to Using Optima

- What makes using Optima difficult?
- When do you get frustrated with the system?
- Why is data entered “late” or not at all?
- What do you do instead of entering info in Optima?
- Other issues?



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Data Purity

- Improving Processes & Standardizing Data
- Data Task Force
 - Led by Beatriz Valdez, Illinois CASA
 - Jen Brown, Illinois CASA
 - Sharie Dodge, McHenry County
 - Abby Fitzgerald, River Valley
 - Taylor Martinez, McLean County
 - Kathie Paravola, DuPage County



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Contact Log Entries

- Updated Activity Types
- Updated Contact Types
- Best Practices for All Fields

Activity Date	<input type="text" value="1/1/2023"/>
Activity Type	<input type="text"/>
Subject	<input type="text"/>
Out of Court	<input type="checkbox"/>
Contact Type	<input type="text"/>
Hours	<input type="text"/>
Mileage	<input type="text"/>
Expenses	<input type="text" value="\$0.00"/>
Notes	<input type="text"/>

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Tips & Tricks

- Copy **Notes** before saving due to system time out
- Paste in **Notes** from another source, e.g., email
- Other Suggestions?





OptimaGo



- Not a true “app” due to confidentiality
- Appears when access Optima via a mobile device via a web-browser
- Do not search for Optima via a web-browser
- Best practice: Add shortcut to your device screen



What's Next?

- What support do you need from your program?
- How can you be a leader in your program for using Optima?



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Questions?



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