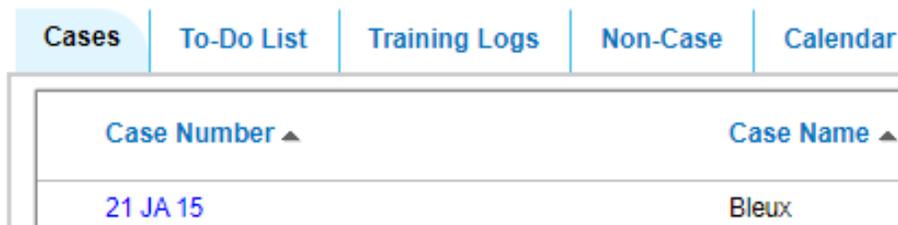


Enter a Contact Log into Optima

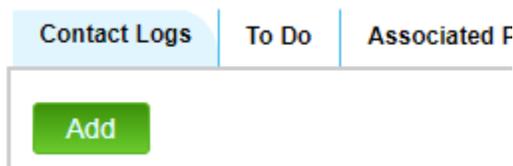
Every interaction you have about your case should be entered into Optima as a Contact Log. This includes contacts with the children, foster parents, caseworkers, CASA staff, school personnel, court, etc. **Everything** you do on your case should be documented with appropriate details in the notes of the contact, including brief texts.

Note: Optima is only accessible within CASA. Enter information fully, without concern about proper report formatting.

- Click the **Cases** tab on your **Volunteers Dashboard**.



- Click the case number in blue text (e.g., *21 JA 15*) to open the case.
- Scroll to the bottom of the page, and select the **Contact Logs** tab.



- Click the **Add** button to begin a new entry.
- To review or edit an existing entry, click the paper/pen icon () to the right of the entry in the Contact Log list.
- Enter information in all pertinent fields:

- **Activity Date:** date of interaction (not necessarily today's date)
- **Activity Type:** select from the list:

Administrative Case Review (ACR)	Child & Family Team Meeting (CFTM)	GAL/Attorney/SAO Contact
Aging Out/Former Youth Advocacy	Child Contact	Health/Well-Being Advocacy
Biological Parent Contact	Collateral Contact	Hotline Call
CASA/Supervisor Contact	Court Hearing	Other
Case Management	Court Report	Parent/Sibling Visitation
Case-Related Meeting/Staffing	Educational Advocacy	Resource/Service Contact
Caseworker/Agency Contact	Foster Parent Contact	

- **Subject:** clarify the Activity Type or enter a brief description of interaction
- **Out of Court:** click checkbox as appropriate
- **Contact Type:** select from the list

Email
 In-Person
 Phone Call
 Text Message
 Virtual
 Voicemail
 Written

- **Hours:** enter amount of time using quarter hour increments (0.25, 0.5, 0.75, 1.0, etc.) For a 30 minute contact, enter “0.5”. Although many interactions are shorter than 15 minutes, please use .25 as the smallest increment of time.
- **Mileage:** enter roundtrip mileage
- **Notes:** enter text about your interaction with as much detail as possible
- In the right column, select **yourself** (CASA) and **everyone** you interacted with for this entry. Always include the **child(ren)** for all Contact Log entries since the contact is about the child, regardless of their presence at the interaction.
- If a person is not listed (e.g., schoolteacher), enter the **First Name, Last Name, and Relationship** to the child.

Note: if you repeatedly need to enter someone on the contact log, consult with your Advocate Supervisor to list the person as an Associated Party.

Click **Create**

The **Status** of the Contact Log is “Pending” until your Advocate Supervisor approves the entry.

Once you enter information, your Advocate Supervisor will “Approve” or “Deny” your entry.

If your contact log is marked “Deny,” read the comments at the end of the **Notes**, update, and re-save your entry for further approval. Once you save the entry, it is again sent to your Advocate Supervisor for approval.