

Optima Training





2

What is Optima

- ▶ Web-based Case Management software system used by CASA programs across the country.
- ▶ Designed to help CASA volunteers and advocate supervisors share case-related information in a secure, organized, easy-to-use fashion.

Table of Contents

3

- ▶ Slide Number
 - ▶ 4 – Why Is Optima Important
 - ▶ 5 – Case Data in Optima
 - ▶ 6 – Tracking Contacts in Optima
 - ▶ 7 – Non Case related info in Optima
 - ▶ 8 – How to Access Optima
 - ▶ 9 – Logging In
 - ▶ 10 – Changing Password
 - ▶ 11 – Volunteer Information
 - ▶ 15 – Accessing your case
 - ▶ 21 – Details of a case file
 - ▶ 22 – Child Information
 - ▶ 33 – Placement Information
 - ▶ 35 – Family Member Information
 - ▶ 41 – Associated Parties
 - ▶ 43 – Contact Logs
 - ▶ 48 – Documents
 - ▶ 52 – Hearings
 - ▶ 59 – Training Logs

Why is Optima Important

- Contact logs - volunteer keeps advocate supervisor informed of developments in the case.
- Forms a record of the case the volunteer and staff can both readily access.
- Optima helps the advocate supervisor fill in if the volunteer is not available.
- Recording your time spent on both case-related and non-case related activities helps CASA track and document volunteer time for reporting purposes.

Case Data in Optima

- ▶ Optima contains a variety of helpful case-related information:
 - Names and key information about the children in the case
 - Contact information for related parties (resource parents, biological parents, etc.)
 - Dates and times of upcoming hearings
 - A log of notes on each case-related contact
 - Case related documents
 - Court reports
 - Court Orders
 - DCP&P court reports
 - Educational records
 - Medical records

Tracking Contacts in Optima

- ▶ Use Optima to document interactions with any of the parties in a case.
- ▶ This keeps the advocate supervisor informed of case-related activities.
- ▶ These notes can be used as a basis for the court report.

Non-case related information in Optima

- ▶ Optima contains Volunteer information
 - ▶ Address
 - ▶ Phone number
 - ▶ Emergency Contacts
 - ▶ Training activities
 - ▶ Documents
 - ▶ Demographics

How to Access Optima

- To access Optima go to
- nj-mercer.evintosolutions.com
- Do NOT put WWW in front of this...



Please enter your user name and password.

User name

Password

[Forgot password?](#)

Log On

Logging In

- Your log in is your first name.last name
 - Ex. John.smith
- Your temporary password is:
 - 123456
 - You will be prompted to change this

Changing Password

- When you log into Optima for the first time, please be sure to change your password to something more secure than the temporary password.
- In the upper right corner of the home screen, you will see a link to “Change Password”
- Remember that Optima contains sensitive, confidential information about the children in your case, so please choose a strong password and keep it secured.



Welcome eagle.green
Change Password | Log Off



Volunteers
Dashboard



Help

Address Book

Personal Info

Cases

To-Do List

Training Logs

Non-Case

Calendar

New Docs

Case Number ▲

Case Name ▲

Petition Date ▼

Action

12345678 E

Piggy/Frog



1

Displaying

➔ To return to the home screen, click the **Volunteer Dashboard Button**



Welcome eagle.green
Change Password | Log Off



Volunteers
Dashboard



Help

Address Book

Personal Info

Cases To-Do List Training Logs Non-Case Calendar New Docs

Case Number ▲	Case Name ▲	Petition Date ▼	Action
12345678 E	Piggy/Frog		 
◀ ◁ 1 ▷ ▶			Displaying

Your Personal information in Optima

- Your personal information section in Optima contains information about you that CASA uses, such as:
 - Contact Information
 - Emergency Contacts
- **Step 1:** Click on the **Volunteer's Dashboard Button** at the top of the screen to make sure you are on the Optima home page
 - **Step 2:** Click the button labeled "**Personal Information**"



Volunteers
Dashboard



Help



Address Book

Personal Info



Cases

To-Do List

Training Logs

Non-Case

Calendar

New Docs

Case Number ▲

Case Name ▲

Petition Date ▼

Action

12345678 E

Piggy/Frog



Personal Information, cont.

- Ensure your personal information is correct
 - Click the **edit** button to make changes
- Add an emergency contact
 - Click the **Add** button

Demographics

[Edit](#) 

First Name	Eagle	Gender	Male
Middle Name		Home Email	
Last Name	Green	Work Email	egreen@casamercer.org
AKA		Best Email	
Address	52 Philly Way	Home Phone	
Address 2		Cell Phone	
City	Medford	Work Phone	
State	NJ	Best Phone	
Zip	08055	Permission to Call at Work	<input type="checkbox"/>
County	Burlington	Permission to Share Info	<input type="checkbox"/>
Hispanic	<input type="checkbox"/>		
Race	White		
Marital Status	Single		

Emergency Contacts

[Add](#) 

First Name	Last Name	Phone	Phone 2	Email
------------	-----------	-------	---------	-------

No records to display.

« ‹ 1 › »

Accessing your case

15

- Step 1: Click the **Volunteers Dashboard** button to return home
- Step 2: Click on the **BLUE** case number
- This takes you directly into your case



Volunteers
Dashboard



Help



Address Book

Personal Info

Cases

To-Do List

Training Logs

Non-Case

Calendar

New Docs

Case Number ▲

Case Name ▲

Petition Date ▼

12345678 E

Piggy/Frog



Parts of a Case file

16

- You will see as you scroll through the file the following sections:
 - Case information
 - Case assignments
 - Children in Case
 - Current Placements
 - Family Members

Parts of a case file, cont.

- ▶ And then tabs along the bottom:
 - ▶ Contact logs
 - ▶ To Do
 - ▶ Associated Parties
 - ▶ Wellbeing
 - ▶ Documents
 - ▶ Petitions and Allegations
 - ▶ Hearings
 - ▶ Services
 - ▶ Placement History

Contact Logs

To Do

Associated Parties

Wellbeing

Documents

Petitions and Allegations

Hearings

Services

Placement History

Add

View Notes

Search

Name	Type	Subject	Date	Hours	Status	Action
Fitzgerald, Laura	A Child Contact: In-Person	Visit	3/15/2022	2	Approved	
Green, Eagle	Contact with DCP&P	spoke to caseworker	10/6/2021	0.25	Pending	  
Green, Eagle	Collaterals Contacted	Psych Eval	1/16/2020	0.5	Approved	
Green, Eagle	A Child Contact: In-Person	Attended a supervised visitation	10/23/2019	3	Denied	 
Green, Eagle	A Child Contact: In-Person	Saw children during supervised	10/22/2019	2.5	Pending	  
Bonacci, Jillian	Case supervisor Notes (for C. Supervisor use only)	Court hearing	8/8/2019	0	Approved	
Green, Eagle	A Child Contact: In-Person	Visit with Child	7/16/2019	3	Approved	

Details of the Case File

- ▶ Case Information
 - ▶ Case Number
 - ▶ Case Name
 - ▶ Petition Date
 - ▶ Notes
 - ▶ This should be approximately a paragraph
 - ▶ Basic history of case
 - ▶ Should be used as the History in court report
- ▶ Case assignments – shows who is attached to the case
 - ▶ Supervisor
 - ▶ Peer Coach (if applicable)
 - ▶ Volunteer

CASE DETAILS

Case Information

Case Number 12345678 E

Case Name Piggy/Frog

County Burlington

Jurisdiction

Priority Case?

Petition Date

Notes

FN - 03 - 134 - 23

Legal Status

Type ▲

Date ▼

End Date ▼

No records to display.



Displaying items 0 - 0 of 0

This information should be taken from the Verified Complaint and should be a brief history and the reason the children were removed. Approximately a paragraph. The advocate should be able to use this as the Case History in their Court report

Case Assignments

Name ▲	Type ▲	Supervisor	Assigned ▼	Released ▼	Reason ▲	Contact Info ▲
Fitzgerald, Laura		<input checked="" type="checkbox"/>	3/7/2022			lfitzgerald@casamercer....
Bonacci, Jillian		<input checked="" type="checkbox"/>	7/8/2019			
Purple, Violet	Peer Coordinator	<input checked="" type="checkbox"/>	7/8/2019			
Green, Eagle	Advocate	<input type="checkbox"/>	7/9/2019			egreen@casamercer.org



Displaying items 1 - 4 of 4

Children in the Case

- This will list each child involved in the litigation
- To get more information on each child, click the magnifying glass on the right hand side



23
Children in Case

Name ▲	AKA/Alias ▲	Gender ▲	Age ▲	Close Date ▼	Volunteer ▲	Supervisor ▲	Next Hearing ▼	Action
Frog, Fozzie		Male	16			Fitzgerald, Laura		
Frog, Pink		Female	14		Green, Eagle	Bonacci, Jillian; Fitzgerald, Laura; Purple, Violet		
Frog, Tad		Male	8		Green, Eagle	Bonacci, Jillian; Fitzgerald, Laura; Purple, Violet		

- The first box will give you basic information
 - Birthdate
 - ID number – the child's DCP&P Spirit number
 - Gender
 - Race
 - Removal Date

Case**Piggy/Frog - 12345678 E**

First Name

Pink

Assigned to Program

Middle Name

E

Most Recent Efforts Date

Last Name

Frog

Cell Phone

AKA

Permission to Text

Birthdate

3/25/2008

Email

SSN

ID Number

234567

[View Child Status History](#)

Gender

Female

Child Status

Hispanic

Status Date

Race

Two or more races

County

Burlington

Referred By

Attorney

Geo Location

Suburban

Referral Date

6/15/2019

Zip Code

08060

Referral Reason

Abuse/Neglect in home

Notes

Removed From Home

Closing Information:

Removed Date

6/14/2019

Program Closure Date

Removed From

Mother

Program Closure Reason

Prior Placements

Court Closure Date

Months in Prior Placements

Court Closure Reason

Deceased

Closing Notes

Child information, cont.

- The tabs along the bottom will need to be filled in
- Languages – to add a Language
 - Step 1: Click **Add**
 - Step 2: Use the **Drop down** menu to choose the language
 - Step 3: Click **create**
 - You can put in multiple languages
- Factors – to add a Factor
 - Step 1: Click **Add**
 - Step 2: Use the **Drop down** menu to choose
 - Step 3: Click **Create**
 - You can put in multiple factors

Languages Factors Schools Social Media Eligibility Placements Hearings Services Permanent Plan Closing Information

Add

Language ▲

Primary Language ▲

Action

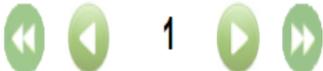
Cantonese



Italian



Portuguese



Referral Reason 28

Removed From Home

Abuse/Neglect in home



Removed Date

9/10/2021

Removed From

Mother

Prior Placements

Months in Prior Placements

Deceased



Notes

Isiah remained in the resource home - bio juvenile m

Add Language ✕

Type

Primary Language



- Languages
- Factors
- Schools
- Social Media
- Eligibility
- Placements
- Hearings
- Services
- Permanent Plan
- Closing Information

Language ▲	Primary Language ▲	Action
No records to display.		

Program Closure Date

Removed Date 9/10/2021

Removed From Mother

Prior Placements

Months in Prior Placements

Deceased

Add Factor ✕

Factor Type ▼



Languages

Factors

Schools

Social Media

Eligibility

Placements

Hearings

Services

Permanent Plan

Closing Information



Factors ▲

Action

No records to display.



Child Information, cont.

➤ Schools

- Step 1: Click on the **Schools** tab
- Step 1a: If your youth has an **IEP**
 - Click the Edit button and change to Yes (No is the default)
- Step 2: Click on the **Add** button under **School History**
 - Step A: Look in the **drop down menu for the school**
 - If it is not there – notify your supervisor
 - Step B: Add their grade
 - Step C: Add the start date (update the end date at the end of the year)
 - Step C1: If they transferred here – put that in
 - Step D: Add a contact name
 - Try to use a guidance counselor – they are easier to reach than teachers
- Step 3: Click Create

Prior Placements

31

Months in Prior Placements

Deceased



Languages

Factors

Schools

Social

IEP

Edit

Individualized Education Program YES

Renewal Date 5/18/20

School History

Add



School Name ▲

Burlington City High School

10

9/1/2020

Burlington City High School

9

12/2/2019

6/20/2020

Lenape High School

9

9/1/2019

12/1/2019

Family moved.

Add School History



School

<<Select a School>> ▼



Grade

School Start Date

School End Date

School Transfer Reason

Transfer Supported

Contact Name

Contact Title

Contact Phone

Contact Email

Cancel

Create

Child information, cont.

- Social media
 - Step 1: Click Add
 - Step 2: Add the type and User name
 - Step 3: Click Create

The screenshot shows a web application interface with a 'Closing Notes' window open. The main interface has a navigation bar with tabs: 'Languages', 'Factors', 'Schools', 'Social Media', and 'Eligibility'. Below the navigation bar is a green 'Add' button. Underneath, there is a 'Social Media' section with a dropdown arrow and the text 'No records to display.' At the bottom of the main interface are four navigation icons: two left arrows and two right arrows.

The 'Closing Notes' window is titled 'Add Social Media' and contains the following fields and options:

- Type:** A dropdown menu with a downward arrow, currently showing a list of options: Facebook, Instagram, Other, and Twitter. 'Twitter' is highlighted in blue.
- User Name:** A text input field.
- Buttons:** A blue 'Cancel' button and a green 'Create' button.

Current Placements

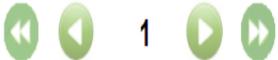
- **Placements** – to see more information, click on the **magnifying** glass



Current Placements

Add

Name ▲	Placement ▲	From ▼	Reason ▲	With Siblings ▲	Contact Name ▲	Contact Info ▲	Action
Frog, Fozzie	Birth parent(s)	4/1/2021		All	Piggy, Miss	609- 	
Frog, Pink	Foster Home- Relative	6/14/2019	Abuse/Neglect	None	Frog, Kelly	856-555-5555	
Frog, Tad	Foster Home - Non-Relative	6/14/2019	Abuse/Neglect	None	Fauntleroy, Natia	(856-778-8231	



Placement 34

Note – the address is in this area, but the phone number is on the previous page.

This also tells you the placement type and placement dates and MOST important...if they are with their Siblings

Case **Piggy/Frog - 12345678 E**

Edit

Child Name Frog, Pink

Child placed with Frog, Kelly

Hearing 8/7/2019 - FN - 03 - 123 - 19

From 6/14/2019

To

With Siblings None

Placement Type Foster Home- Relative

Placement Reason Abuse/Neglect

Reasonable Distance

In County

Notes

Address 235 Lily Pond Way

Address 2

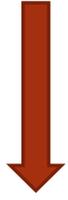
City Burlington

State NJ

Zip 08016

County Burlington

Facility Notes



Family Members

35

- This area lists the family members known to the Division
- Click on the **magnifying glass** to see more information
 - Name
 - Address
 - Any information we have gathered

Family Members

Add

Name ▲	AKA ▲	Relationship ▲	Active ▲	Deceased ▲	Contact Info	Action
Frog, Kelly		Paternal Grandmother	<input checked="" type="checkbox"/>	<input type="checkbox"/>	856-555-5555	
Frog, Kermit		Father	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Piggy, Miss		Mother	<input checked="" type="checkbox"/>	<input type="checkbox"/>	609-555-1234	

Family Member

Case Piggy/Frog - 12345678 E

[Edit](#)

First Name	Miss	Home Phone	609-555-1234
Middle Name		Cell Phone	
Last Name	Piggy	Work Phone	
AKA		Home Email	
Gender	Female	Work Email	
Hispanic	<input type="checkbox"/>	Education Type	High School
Race	White	Substance Abuse	<input checked="" type="checkbox"/>
Birthdate	1/1/1989	Single Parent Home	<input type="checkbox"/>
Incarcerated	<input type="checkbox"/>	Deceased	<input type="checkbox"/>
Homeless	<input type="checkbox"/>	Active	<input checked="" type="checkbox"/>
Address Line 1	123 Holly Lane	Notes	
Address Line 2			
City	Mount Holly		
State	NJ		
Zip Code	08060		
County	Burlington		

If we have additional information such as language, factors, concerns, services or employment, we can enter that information

Relationships | Languages | Factors | Concerns | Services | Employment

Child

Add

First Name ▲	Last Name ▲	Relationship ▲	Action
Pink	Frog	Mother	 
Tad	Frog	Mother	 

◀ ◁ 1 ▷ ▶

Add a family member

- If we find out there is another family member, you can add them in
- Click **ADD**
- Fill in all the information that you have
- Then Click **Create**

Family Members

Add



Name ▲	AKA ▲	Relationship ▲	Active ▲	Deceased ▲	Contact Info
Frog, Kelly		Paternal Grandmother	<input checked="" type="checkbox"/>	<input type="checkbox"/>	856-555-5555
Frog, Kermit		Father	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Piggy, Miss		Mother	<input checked="" type="checkbox"/>	<input type="checkbox"/>	609-555-1234

Case ID: 123456789

First Name

The First Name field is required.

Middle Name

Last Name

AKA

Gender Male Female

Hispanic

Race

Birthdate

Incarcerated

Homeless

Address Line 1

Address Line 2

City

State

Zip Code

County

Home Phone

Cell Phone

Work Phone

Home Email

Work Email

Education

Substance Abuse

Single Parent Home

Deceased

Active

Notes

(0 out of 5000)

Cancel

Create



You must add the child/ren under the **relationship** tab.
Click **Add**
Choose the **child** and **relationship** type
Click **create**

Relationships | Labels | First Name | Concerns | Services | Employment

Child

Add

First Name	Last Name	Relationship	Action
Pink	Frog	Mother	
Tad	Frog	Mother	

Navigation: << < 1 > >>

Add Family Relationship

Child Fozzie Frog

Relationship Type

Create

- << Select Item >>
- << Select Item >>
- Brother
- Father
- Father's girlfriend/boyfriend
- Maternal Aunt
- Maternal Cousin
- Maternal Grandfather
- Maternal Grandmother
- Maternal Grandparents
- Maternal Uncle
- Mother
- Mother's girlfriend/boyfriend
- Paternal Aunt
- Paternal Cousin
- Paternal Grandfather
- Paternal Grandmother
- Paternal Grandparents
- Paternal Uncle
- Sister

Services | Employment

Associated Parties

41

- This is where non-family members are listed
- If a caseworker, attorney, therapist changes, you can add a new one
- Step 1: Click **ADD**

Contact Logs To Do **Associated Parties** Wellbeing Documents Petitions and Allegations Hearings Services Placement History

Add



Name ▲	Association ▲	Type ▲	Company ▲	Child ▲	Family ▲	Released ▲	Contact Info ▲	Action
Ahiekpor, Eric	Caseworker		DCP&P Caseworker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	609-265-3241	
Bryant, Laura	Attorney		Defense Attorney	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	609-599-6900	
Butler, Valerie	Attorney		DAG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	856-770-5959 Valerie.butler@dol.lps.state.n...	
Cardoza, Renee	Attorney		Defense Attorney	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	609-599-6900	
Cooperson, Danielle	Caseworker		DCP&P CW Spvr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	609-880-9300 ex	
Dale, Tara	Caseworker		DCP&P Spvr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	609-265-3232	
Fauntleroy, Natia	Interested Party	Foster Care		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(856-778-8231	
Little, Marigold	Interested Party	Foster Parent(s)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	555-345-6789	
Mastendrea, Lydia	Attorney		Law Guardian	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	609-518-3068	
Pieller, Melissa	Interested Party	Therapist	Mill Hill	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Step 2: Select the **Associated Party** you want to add

Step 3: Use the **Drop down** list to select the name

Step 4: Click **Save**

IF the person is not there, contact your supervisor, they will create the contact

The screenshot shows a web form titled "Associated Party" with the following elements:

- Case:** Piggy/Frog - 12345678 E
- Party Type:** Radio buttons for Attorney, Caseworker, and Interested Party. A red arrow points to the Attorney option.
- Associated Party:** A dropdown menu showing "<< Select Party Type >>" with a downward arrow. A purple arrow points to the dropdown. To the right of the dropdown is the text "If not found in list" and a blue "New" button.
- Buttons:** A blue "Cancel" button, a green "Save" button, and a green arrow pointing to the "Save" button.

Contact Logs

- Except for visiting youth, Contact logs are the MOST important part of being a CASA
- Step 1: Click on the **Contact Logs** Tab
- Step 2: Click **Add**
- Step 3: Put in the **Date of the Activity**
- Step 4: Use the drop down menu for the **Activity Type**
 - If the child is seen during the activity, then the Activity Type will Always be Child Contact
 - For example – if you attend an IEP meeting and the Child is there, this is still considered Child Contact
- Step 5: Type the **Subject** in

Contact Logs, cont.

- Step 6: Use the drop down menu for the **Contact Type**
- Step 7: Put in the **Hours**
 - Hours are done in quarter hour increments - .25 = 15 min; .50 = 30 min; .75 = 45 min; 1 = 1 hour
 - Notes are a minimum of .25
 - Hours include travel time
- Step 8: Mileage
 - Add if you want to use for tax purposes

Contact Logs, cont.

- Step 9: **Notes**
 - This section should include what was discussed
 - It does NOT have to be the conversation verbatim
 - It should be enough that anyone can know what happened
 - Please do not just write – Visited with child
 - You should be able to review your notes to use for your report
- Step 10: **Contact box on the right**
 - Check off any individuals you spoke with during the encounter
 - The Child should be checked off on **EVERY** contact log
- Step 11: Click **Create**

Contact Logs, cont.

[Contact Logs](#) ← [Types](#) | [Wellbeing](#) | [Documents](#) | [Petitions and Allegations](#) | [Hearings](#) | [Services](#) | [Placement History](#)

[Add](#) ← [View Notes](#) [Search](#)

Name	Type	Subject	Date	Hours	Status	Action
Fitzgerald, Laura	A Child Contact: In-Person	Visit	3/15/2022	2	Approved	
Green, Eagle	Contact with DCP&P	spoke to caseworker	10/6/2021	0.25	Pending	
Green, Eagle	Collaterals Contacted	Psych Eval	1/16/2020	0.5	Approved	
Green, Eagle	A Child Contact: In-Person	Attended a supervised visitation	10/23/2019	3	Denied	
Green, Eagle	A Child Contact: In-Person	Saw children during supervised	10/22/2019	2.5	Pending	
Bonacci, Jillian	Case supervisor Notes (for C. Supervisor use only)	Court hearing	8/8/2019	0	Approved	
Green, Eagle	A Child Contact: In-Person	Visit with Child	7/16/2019	3	Approved	

1

Displaying items 1 - 7 of 7

Contact Log

Case Number: 12345678 E

Case Name: Piggy/Frog

Activity Date: 

Activity Type:

Subject:

Out of Court:

Contact Type:

Hours:

Mileage:

Expenses:

Notes:

(0 out of 5000)

Select	Pertains to	Party Type
<input type="checkbox"/>	Angela Watson-Bell	Attorney
<input type="checkbox"/>	Laura Bryant	Attorney
<input type="checkbox"/>	Lydia Mastendrea	Attorney
<input type="checkbox"/>	Valerie Butler	Attorney
<input type="checkbox"/>	Danielle Cooperson	Caseworker
<input type="checkbox"/>	Eric Ahiekpor	Caseworker
<input type="checkbox"/>	Tara Dale	Caseworker
<input type="checkbox"/>	Fozzie Frog	Child
<input type="checkbox"/>	Pink Frog	Child
<input type="checkbox"/>	Tad Frog	Child
<input type="checkbox"/>	Kelly Frog	Family Member
<input type="checkbox"/>	Kermit Frog	Family Member
<input type="checkbox"/>	Miss Piggy	Family Member
<input type="checkbox"/>	Natia Faunteroy	Foster Care
<input type="checkbox"/>	Marigold Little	Foster Parent(s)
<input type="checkbox"/>	Melissa Pieller	Therapist
<input type="checkbox"/>	Eagle Green	Vol/Supv/Atty
<input type="checkbox"/>	Jillian Bonacci	Vol/Supv/Atty
<input type="checkbox"/>	Laura Fitzgerald	Vol/Supv/Atty
<input type="checkbox"/>	Violet Purple	Vol/Supv/Atty

Others Contacted:

First Name:

Last Name:

Relationship:

Cancel

Create



Documents

- Any and all documents associated with the case should go here
- Step 1: Click **Add**

Contact Logs

To Do

Associated Parties

Wellbeing

Documents

Petitions and Allegations

Hearings

Services

Placement History

Add

Filter by

Document Type

Start Date

End Date

Apply

File Name ▲	Document Date ▼	Document Type ▲	Added By ▲	Add Date ▲	Action
VOCA Burl Q1 2019 LF.doc	10/22/2019	Police Report	Green, Eagle	10/23/2019	🔍
Great report example.doc	7/22/2019	CASA Court Report - Final	Green, Eagle	7/29/2019	🔍
Order of Appointment - rev for PCs.doc	7/16/2019	CASA Order of Appointment	Green, Eagle	7/29/2019	🔍
Verified Complaint_Redacted.pdf	7/10/2019	Verified Complaint	Green, Eagle	7/29/2019	🔍

Documents, cont.

- Step 2: **Choose File** – this is like attaching a document to an email

Document

Case Piggy/Frog - 12345678 E

File Name (Ctrl+click to multi-select)  No file chosen

Document Type << Select Type >> ▾

Document Date 

Documents, cont.

- Step 3: Choose **Document Type**

The screenshot shows a web application interface for adding a document. The interface includes a top navigation bar with 'Volunteers Dashboard' and 'Help' buttons. Below is an 'ADD' section with a 'Document' tab selected. The 'Case' section contains a 'File Name' field, a 'Document Type' dropdown menu, and a 'Document Date' field. A purple arrow points to the 'Document Type' dropdown, which is open, showing a list of document types. At the bottom are 'Cancel' and 'Save' buttons.

Volunteers Dashboard **Help**

ADD

Document

Case

File Name
(Ctrl+click to multi-select)

Document Type 

Document Date 

Cancel **Save**

<< Select Type >>

- Academic Assessment
- Authorization for Release of Info
- CASA Court Report - Draft
- CASA Court Report - Final
- CASA Order of Appointment
- CASA Order of Release
- Correspondence
- Court Orders
- File Review Documents
- Individualized Family Service Plan
- Medical Records
- Medication Evaluation
- Mental Health Provider Report
- Permission to Transport
- Police Report
- Psychological Evaluation
- Speech/Language Evaluation
- Substance Abuse Evaluation
- U A Report

Documents, cont.

- ▶ Step 4: Add the **Date** and **Save**

The screenshot shows a form titled "Document" with the following fields and controls:

- Case:** Piggy/Frog - 12345678 E
- File Name:** (Ctrl+click to multi-select) with a "Choose Files" button and "No file chosen" text.
- Document Type:** Psychological Evaluation (dropdown menu).
- Document Date:** An empty text box with a calendar icon. A green arrow points to this field.
- Buttons:** "Cancel" (blue) and "Save" (green). A blue arrow points to the "Save" button.

Hearings

- This is where all hearing information can be found
- This will provide:
 - **Hearing Date**
 - **Hearing Time**
 - **Report Due Date**
 - **Hearing Type**
 - **Judge**
 - **Hearing Status**

Hearings, cont.

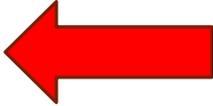
- Most of this information is provided by the Supervisor
- HOWEVER – it is your responsibility to check it often to:
 - Ensure when your report is due
 - When you are to be in court
 - After the court date, the notes from the hearing
- To see anything from the court hearing, Click on the **Magnifying glass** - 

Contact Logs							
To Do	Associated Parties	Wellbeing	Documents	Petitions and Allegations	Hearings	Services	Placement History
Date ▼	Time ▼	Report Due ▼	Location ▲	Hearing Type ▲	Judge ▲	Status ▲	Action
9/18/2019	8:30 AM	9/4/2019		Compliance Review, Permanency Hearing	Philip Haines		
6/11/2019	9:00 AM	5/28/2019		Compliance Review	Philip Haines	Held - Completed	

Hearing

Case Piggy/Frog - 12345678 E

Edit

Hearing Date	6/11/2019	Hearing Status	Held - Completed
Hearing Time	9:00 AM	Judge	Philip Haines
Report Due	5/28/2019	Order Filed	6/11/2019
Docket Number	FN - 03 - 123 - 19	Order Received	6/11/2019
Hearing Location		Attorney Attended	<input type="checkbox"/>
Notes	Any notes from the case 		

Hearings, cont.

56

- Hearing Outcomes shows what happened at the hearing
- Hearing Participants shows who attended

Hearing Types | **Hearing Outcomes**

Add

Name
Services ordered

Hearing Participants

Children | **Family Members**

Add

Name
Frog, Kermit
Piggy, Miss

Hearings, cont.

57

- Volunteer Input – shows how many recommendations were accepted
- Court Ordered Services – what was ordered by the court

Volunteer Input

Add

Volunteer Name ▲	Excused ▲	Report Required ▲	Recommends Accepted ▲	Recommends Rejected ▲	Recommends Negotiated ▲
Green, Eagle	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2		

⏪ ⏩ 1 ⏪ ⏩

Displaying items 1 - 1 of 1

Court Ordered Services

Add

Type	Child Name	Family Member Name	Specified Completion Date	Actual Completion Date	Acti
Psychological evaluation		Piggy, Miss	9/1/2019		
Educational evaluation	Frog, Pink		9/7/2019		
Substance abuse treatment		Frog, Kermit			

Hearings, cont.

58

- Visitation – What is the visitation plan?
- Permanency – What is the permanency plan?

Visitation

Add

Family Member	Child	Type	Specified Frequency	Actual Frequency
Piggy, Miss	Frog, Pink	Supervised - By Department	1 x weekly	
Piggy, Miss	Frog, Tad	Supervised - By Department	1 x weekly	
Frog, Kermit	Frog, Pink	Supervised - Family & Friends Approved	Unlimited	
Frog, Kermit	Frog, Tad	Supervised - Family & Friends Approved	3 x weekly	

Permanent Plan

Add

Child	Permanent Plan Type	Caseworker Permanent Plan Type
No records to display.		

Training log

- To check or add to your training log
- Click on the Training Log tab
 - This will show your training and whether it has been approved or not
 - This is also where you can enter your own training



Volunteers
Dashboard



Help

Address Book

Personal Info

Cases

To-Do List

Training Logs

Non-Case

Calendar

New Docs

Add



Total YTD Hours: 0

Complete Date ▾	Training Topic ▾	Hours	Mileage ▾	Status ▲
4/1/2021	Trauma Training	2		Pending
6/14/2019	Medical Advocacy	3	7	Approved
5/4/2019	Medical Advocacy	3		Approved
4/2/2019	Educational Advocacy	3		Pending

To add training

60

- Step 1: Click the **Add** button
- Step 2: Enter the **dates** of training
- Step 3: Enter the Training **Topic**/Training **Format**/Trainer
- Step 4: **Hours** (of training only – no travel time)
- Step 5: Mileage (if you are tracking for tax purposes)
- Step 6: Notes – brief note about what the training was about
- Step 7: Click **Create**

In-Service Training

Schedule Date  

Complete Date 

Training Topic  

Training Format  

Trainer  

Hours 

Mileage

Notes

(0 out of 2000)

