



# FREQUENTLY ASKED QUESTIONS

*for*



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## 1. What should I do if I forget my password to log onto Optima?

**Background:** Optima requires a password for each user. Your default password is:

- For GALs certified before April 2016= your date of birth in MM/DD/YYYY format (with “/” slashes)
- For GALs certified after April 2016= 123456

We recommend that you change your password once you log on initially. Please do so using the “Change Password” link in the upper right corner of the screen *after* you log in. If you forget your password, you have several options. Below is the recommended course of action.

**To request assistance regarding a lost password, please follow the below instructions:**

1. Do NOT click on the “Forgot Password” link. Most of the time, this does not accomplish the goal of getting a new password sent to you.
2. Instead, please contact your CAM or local GAL office, letting them know that you are locked out of Optima. Some staff members have permissions to manually reset passwords and will do this for you upon request.
3. If staff is not immediately available to assist you, please send an email or leave a voice message. Then please wait for a GAL staff person to contact you with your new password.
4. The new password set by staff will be generic. Use it to log onto Optima.
5. If desired, use the “Change Password” link (again, *after* you log on) and update your password to something that you will remember.

## 2. Do Optima passwords expire?

No. There is no time limit for how long you can use the same password for Optima.

## 3. Why can't co-GALs share the same case in Optima?

**Background:** A courtesy GAL is needed when a child resides outside of the county in which the dependency case is based. Courtesy cases are distinguished by being “in-circuit” and “out-of-circuit”.

For example: a Lee county court case with child placed in Charlotte county is “in-circuit”. Both counties are part of Circuit 20. If the child lived in Miami-Dade county, the courtesy case would be considered “out-of-circuit”. Miami-Dade is not in Circuit 20.

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All circuits use the Optima platform, but they do not share the same database of information. For that reason, only “in-circuit” courtesy cases are able to be fully shared by the primary and courtesy GAL.

**Tip:** GAL staff has access to a statewide database that contains ALL cases. The statewide database is “read only”, meaning that no one can enter, edit, or delete any records. From this database, your CAM can obtain information regarding out-of-circuit courtesy cases.

#### 4. What is the “Help” icon used for?

**Along with your Volunteer Dashboard, there is one other icon when you log into Optima. The “Help” icon can be used to find:**

- Information about Optima Go!, the mobile-friendly version of Optima that is easier for your smartphone to load. Optima Go! is convenient to use for adding/viewing contact logs, viewing documents, adding/viewing/editing hearings and adding/viewing/editing calendar events.
- A running log of Optima updates that may impact the functionality of certain Optima features or the ability of Optima to capture certain kinds of information that it previously did not track.

#### 5. I have new contact information. Can I update this in Optima?

**Background:** The GAL program utilizes your contact information to ensure an uninterrupted flow of information between you and the staff. If your contact information has changes, please let us know!

1. Log into Optima. On your Volunteer dashboard/home screen, click on the light blue “Personal Info” button.
2. In the Demographics section, click on the green “edit” button. Make changes/corrections to all applicable fields and click “save”. **NOTE:** If you are updating your email address or phone number, please let your CAM know via phone or email.
3. If you haven’t already done so, please add a contact person in the Emergency Contacts section (below Demographics).
4. If you have changed employment or retired since you started with the GAL program, you can note this in the “Employment” section.
5. If you would like to communicate your case preferences, you may do so in the “About” section.

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## 6. How do I update my emergency contact?

**We recommend adding an emergency contact to your Optima so that we know who to call if we cannot reach you and need to get in touch regarding your GAL case or GAL service.**

**To update/add your emergency contact:**

1. On your volunteer dashboard, click on the light blue “personal info” button.
2. Scroll down past your address to the “Emergency Contact” section.
3. Use either the green “Add” button to add a new contact OR click on the pen-and-paper icon to edit a current contact.
4. Make sure to save any changes you make!

## 7. How do I log my in-service hours?

**Background:** Optima requires that users log their own in-service hours. Hours can be entered as soon as training is attended, book is read, or other qualifying activity is completed. All GALs are required to complete 12 hours of in-service credit per calendar year. You are also now able see your in-service total at any time. On the “Training Logs” tab, your Year-to-Date (YTD) hours and mileage appear on the right side of the screen. Optima calculates these totals on the calendar year.

**To log your hours, please follow these steps:**

1. Log in to Optima. Select “Training Logs” tab.
2. Click green “Add” button.
3. Enter a “Schedule Date” and a “Complete Date”. These will be the same unless the training took place over the course of several days. If that is the case, the first day of training is the “Schedule Date” and the final day of training will be the “Complete Date”.
4. Select training topic- best fit from the drop-down list.
5. Select training format- best fit from the drop-down list.
6. Trainer is left blank.
7. Enter the number of hours to the nearest ¼ hour.
8. Enter mileage travelled to and from the training, if applicable. (OPTIONAL)
9. Enter specific training title in notes section. This is REQUIRED if the training is not a program offered directly by the GAL Program.
10. You may also enter additional information in the notes section, not to exceed a total of 2000 characters.

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## 8. Where do I add hours for activities that aren't related to my cases?

**Background:** If you would like to maintain a record of volunteer hours that are not directly related to your cases or to your in-service training, you can do so in Optima. Remember that you will log all activities that qualify for in-service credit in the Training Logs section of Optima. Examples of non-case, non-training activities are: participating in advisory council or Board meetings, attending holiday parties or appreciation events, traveling to in-services, mentoring a new GAL, or assisting with office activities (filing, etc.).

### To log non-case volunteer hours:

1. Log into Optima. On your Volunteer dashboard/home screen, click on the tab labeled “Non-Case”. [4<sup>th</sup> tab from the left]
2. Click the green “Add” button.
3. Complete the form as thoroughly as possible. Required fields include date, activity type, and hours. Optional fields include mileage, expenses, and notes.
4. Click the green “Create” button in order to save your entry.

### NOTES:

- Entries on the non-case tab are not subject to approval by your CAM.
- Hours entered in this section will NOT count toward your annual in-service requirement.
- Mileage and expenses *will* appear on your annual mileage/expenses report should you request one (see Question 6).

## 9. Where can I get a report of my annual mileage and expenses?

**Background:** Some GAL volunteers choose to use their mileage and expenses for tax purposes. Optima allows for staff to pull a report that will list your miles traveled and expenses paid for all of your GAL activities. Case and training-related mileage and expenses will be included.

### To request your mileage/expenses report:

Please call or email Krista Jackson at 239-533-1428 or [krista.jackson@gal.fl.gov](mailto:krista.jackson@gal.fl.gov) after the first of the year.

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## 10. I want to add information to a section of my case. Where's the "Add" button?

**Background:** Optima is designed for all members of the advocacy team to enter information. Some sections are only editable by certain members of the advocacy team. If you do not see a green "Add" or "Create" button, odds are that you do not have permissions in Optima to edit the information in that section of the case.

**If you believe that information in Optima needs to be updated, corrected, or otherwise changed- and you cannot make these changes- please consult your CAM.**

## 11. My child has changed schools. Where can I note this in Optima?

**Background:** There are many pieces of information that Optima is ready to collect, including where the child goes to school, if the child has an IEP, and any disabilities the child has. GAL volunteers are welcome (but not required) to update this information for their assigned case children.

**To update/add additional information pertaining to your case child:**

1. Click on your case.
2. Scroll down to the section "Children in Case". Click on the magnifying glass on the row of the child you want to edit.
3. Scroll down and look for a row of tabs. You have the ability to add onto or edit the first three of these tabs: Languages, Disabilities, and Schools.

## 12. How do I edit or add a family member or non-relative?

**Background:** Family members, even if they are not caregivers for our case children, can be included in Optima. Optima can keep track of relatives' and non-relatives' contact information, which often comes in handy when trying to establish permanency for our kids. **REMEMBER:** Licensed foster parents are NOT considered relatives or non-relatives!

**To add a family member or non-relative to Optima, please follow these instructions:**

1. Navigate to the case profile in Optima. Scroll down to the section titled "Family Members".
2. Is the family member you want to add/edit already on the list? If so, **skip to Step 6**. If not, click on the green "add" button.

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3. You will be taken to a screen with many information fields. Fill out as much information as you can. Click the green “Create” button.
4. On the next screen, scroll down to the section titled “Relationships”. Click the green “add” button.
5. Select the case child/children and the child/children’s relationship to the family member that you just added (“non-relative” is an option). Click “Save”. **NOTE:** If you have a case with multiple children, the family member might not have the same relationship to every child. You might have to make several relationship entries.
6. If a family member or non-relative’s information changes, you can edit it at any time. From the main case profile, click on the magnifying glass on the same row as the person’s name.
7. Click on the green “edit” button to make changes to any of the information fields. Make sure to “save” all changes that you make.

### 13. How can I add my child’s case manager, therapist, or other “associated party”?

**Background:** Case managers, therapists, teachers, and other service providers are considered “associated parties” to a case. Volunteers are able to link an associated party to a child or case if the person has already been created in Optima by a staff member. For example, most child welfare case managers have been put into Optima by GAL staff. However, if your child’s case manager was just hired last week, she might not yet be in Optima. If your child is seeing a therapist that is rarely utilized by other case children, the therapist may not yet be included in Optima.

**To associate a party with your case, please follow these instructions:**

1. Navigate to the case profile in Optima. Scroll down and select the third tab from the left “Associated Parties”.
2. If you do not see the person under the list of associated parties, select the green “add” button.
3. Choose the type of party: choose “caseworker” if you seek to add a child welfare case manager; choose “interested party” if you seek to add someone else.
4. Depending on what selection you made, the drop down list will be populated alphabetically with all persons who have already been created in Optima by GAL staff. Select the person you seek to add. (**NOTE:** If the person you seek to add does not appear

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on the drop-down list, please provide your CAM with the person’s full name, title, and contact information.)

5. Click green “save” problem. A new screen will launch and ask you to select which of the case members are associated with this new person. (For example, if you are adding a therapist, and the therapist works with Jane of but not with Joey, only check the box next to Jane’s name.)

## 14. How do I upload a document into Optima?

**Background:** Volunteers as well as staff are able to upload case-related documents into Optima. Staff will continue to upload documents that are filed with the court. Examples of documents that volunteers might upload are: school records, service provider records, report cards, and hand-written staffing notes. Many times, these documents are emailed to you in an electronic format. However, if you receive a paper document and cannot upload it into Optima yourself, your CAM can assist you.

**To upload a document, please follow the below instructions:**

1. Save the document to your computer in a familiar location (e.g. on the desktop or in a folder named after the case). Use a file name that describes the document in some way (e.g. “Jane’s 1<sup>st</sup> quarter report card 2016-17”).
2. Navigate to the specific case to which you would like to upload a document.
3. Find the “Documents” tab (4<sup>th</sup> tab from left). Click on the heading.
4. Click the green “add” button.
5. Select “browse” and locate the document you would like to upload.
6. Choose a “document type” from the drop-down list. (Best fit)
7. In the “Document Date” section, please use the date that the document was generated, the meeting was held, etc.
8. Don’t forget to click “Save”!

## 15. How do I know when new court documents become available?

**Background:** Staff members are no longer emailing court documents to volunteers. Instead, documents are being uploaded directly into Optima. There is a special area on your Volunteer dashboard/Optima home screen that keeps track of all documents that have been uploaded within the past 14 days.

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**To find newly-uploaded documents:**

1. From your Volunteer dashboard/Optima home screen, navigate to the “New Docs” tab (last tab on the right).
2. A list of all documents uploaded within the past 14 days for all of your cases will appear.
3. If you have multiple cases, you can use the blue headings along the top (“Case Number”, “Case Name”, etc.) to group the documents by case.
4. Once a document has been in Optima for 14 days, it will disappear from the “New Docs” tab. This does not mean that the document has disappeared altogether; it will *always* be included in the documents section of the case itself.

**16. How can I find a specific case document quickly?**

**Background:** Optima automatically sorts documents by date. You can click on the blue heading above each column in the list of documents to sort them in other ways. However, if you want to find documents from a specific date range or of a specific type, you can use the filter feature described below.

**To update/add additional information pertaining to your case child:**

1. Click on your case.
2. Scroll down to the section “Documents”. You will see an orange “Filter by” box. You can use the search fields to look for specific document types and/or specific date ranges.
3. Once the search fields have been designated, click the blue “Apply” button. The documents that meet the search criteria will appear below.

**17. How do I save a contact log so that I can go back to it and edit it at a later time?**

**Background:** All contact logs created in Optima are automatically routed to your CAM for approval. The system is not set up to save a contact log as a draft.

**There are several options for addressing this issue:**

*For long notes, type them out in another program first.* Use Word (or another word-processing program) to type out the narrative portion of your contact log first. You can save this on your computer and then cut and paste the text into Optima once you are done. This will be helpful if you are working on contact logs while simultaneously attending to other duties. Optima will “time out” if the program is idle for an extended period of time. In some cases, this has led to loss of the record.

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Signal to your CAM that the log is still “in progress”. Use an all-caps phrase or sentence at the beginning of your contact log notes that he or she will see (e.g. “DRAFT”, “NOTE IN PROGRESS” or “JANE, I WILL BE FINISHING THIS NOTE LATER TODAY 11/5”).

**Did you accidentally submit a log that you are not happy with? Maybe you entered a log for the wrong case?** Oops...but don't panic! Email or call your CAM. He or she can “reject” the contact log that you submitted. It will be sent back to you for you to correct.

## **18. Do I have to create a new contact log for every phone call, text message, and email exchange on my case?**

**Background:** Optima contact logs replace the previous monthly contact log, wherein all monthly activities for a case were grouped together and submitted at the end of the month. Optima requires that you document case contacts separately. You have the ability to complete a log for each case activity as soon as it occurs. For some GALs, this change in procedure has led to an increase in the amount of time that they spend on documentation.

### **Best practices and time-saving recommendations for contact logs:**

Group contacts about the same subject together. For example, let's pretend your case child has been in trouble at school. You have spoken to her case manager, foster parents, and school counselor, and have also spoken to your CAM regarding school issues over the course of the past five days. You can enter ONE contact log to capture this information.

Keep basic notes on a notepad or Word document; pick one day during the week to enter them into Optima. There is no specific time limit to when an activity has to be entered. We recommend that you enter notes timely so as not to lose the information that you have in your head, but jotting notes down on paper might be all that you have time for on a Tuesday afternoon.

## **19. Is there a way to view ALL of the contact logs for my case without having to open each one individually?**

**Background:** Optima has a feature that will allow you to pull up a list of all of the contact logs entered on your case.

To launch a view of all notes entered on your case, please follow these steps:

1. Go into your case. Scroll down to the contact logs section.
2. Click on the lighter blue “View Notes” section in the upper right-hand corner of this section.

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3. A new screen will launch, showing a running list of contact logs for your case entered by all users in chronological order.

## **20. I'm looking for a list of all of my home visit notes since the last Judicial Review on my case. Is there a quick way to find these?**

**Background:** Optima has a feature that will allow you to search all of the contact logs on your case. You may search by date, subject, activity type, and more! This feature allows you to do such things as: quickly find out how many face-to-face contacts you have made with your case child this month (or year), determine how many phone calls you made to a case manager or caregiver, or reference your notes from all permanency staffings. You can do all of this without having to manually search through your notes!

To create a search for your contact logs, please follow these steps:

1. Go into your case. Scroll down to the contact logs section.
2. Click on the darker blue "Search" button.
3. A new screen will launch, showing a series of search fields.
4. Enter a date range for the desired notes. Use the calendar icon as a shortcut!
5. To use any of the other search fields, you must first un-check the "Null" box. Once that is unchecked, you will be able to search by subject, party (who involved in the case the note pertains to), activity type, and volunteer (GAL who entered the note). You do not HAVE to use every search field. Use only the ones that you need.
6. Once you have entered the information into your search, click on the white "Preview" button at right.
7. The results of the search will launch below. You can read through them or launch them as a PDF or Word document by clicking the drop-down menu titled "Export to the selected format".

**Do you have an Optima question that this Q&A hasn't covered?**

**Please submit them to Krista Jackson at**

**[Krista.Jackson@gal.fl.gov](mailto:Krista.Jackson@gal.fl.gov)**

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