



Volunteer Guide



Introduction and Overview

Welcome to Optima!

Optima is an effective and productive Advocacy and Volunteer Management system designed by a team of experts who have spent years working in the child welfare field. What does this mean to you? It means that you will now be able to capture important child advocacy case information, upload case documents, *and* easily share them with your volunteers—all in the same place. Optima provides us with a system that organizes data, tracks information and produces reports in a versatile, easily accessible web based design. Staff members *and* Volunteers will have 24/7 secure access to all their important case information from virtually any web accessible device (including desktop computers, laptops, tablets and smart phones). It even has a talk-to-text feature that allows you to directly enter case information on the go—providing you have access to the internet.

Volunteer Recruiters will now be able to easily enter and track information on people interested in becoming Volunteers from initial inquiry, online application, training and certification. Reference checks are generated and emailed from Optima, saving valuable time for Recruiters and Admin Staff. The online Volunteer Application generates the initial Advocate record in Optima – another valuable time saving feature.

With Optima, volunteers have a “real-time” system that helps them stay organized and in control of advocacy case and personal information that is important to them. They will be able to upload case documents, create To Do Lists for advocacy activities, keep track of hours spent, miles traveled and even enter their own in-service hours. Optima also provides them with an address book where they can keep all of their contact information—eliminating the need to carry folders with them and ensuring that case data is secure and readily accessible.

Logging-On for the First Time

Please type the **web address** into your browser exactly as follows:

<https://fl-20th.evintosolutions.com>

Your **User Name**: First.Last (period in between first and last name)

Your default **Password**:

- If you started with GAL program prior to April 2016= Your date of birth in MM/DD/YYYY format with the slash marks
- If you started with the GAL program after April 2016= 123456

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User name: First.Last

Password: date of birth MM/DD/YYYY **OR** 123456

Resetting Passwords

The first time you log into the system, you will need to change your password using the “Change Password” link located in the upper right corner of your screen just below your user name.

To reset a password a system user has forgotten, you must have the Admin Role associated with your user role. Please request a password change by contacting your CAM or Krista Jackson at krista.jackson@gal.fl.gov

Notes on Using Optima

There are a few things you should keep in mind when using Optima:

- Optima works best when accessed via Google Chrome, Firefox, or Safari browsers. (This does not mean you cannot use Optima if the only browser you have access to is Internet Explorer.)
- Optima does not automatically “remember” what you’ve entered. For every piece of information you enter, there will be a green **Create** or **Save** button. If you forget to click on either of those options after you have entered information, it will not be retained.
- For security purposes, each user who has access to Optima **must** have a unique email address. (This means that husband and wife teams cannot share the same email address.)
- This system contains our confidential case records and documentation. Please be sure to log off if you are leaving your work station, computer, or web accessible device.

“Cases” tab

- This is the default tab that will display when you log into Optima. Your case or cases will appear.
- Click on the case number (blue font), which is a hyperlink. This will take you into the case itself, where you can see case information such as participant’s names, the name of the attorney assigned, the child’s name and age, etc.
- A list of case contact logs (see next section) can be found at the bottom of the case page.

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* ACTION REQUIRED * Contact Logs (see separate cheat sheet)

Description: Contact logs are used to document any case information or events that take place such as child visits, hearings, school information, medical information, etc. Any individual assigned to the case, whether it is a CAM, a best-interest attorney, or a Volunteer Child Advocate can enter a contact log.

Your contact logs must be approved or denied by your CAM. If denied, the CAM will let you know what updates are needed. Contact logs entered by the Volunteer can be edited until they have been approved. Once a contact log has been approved by the CAM, the Volunteer can no longer edit the note. CAMs have a window of time during which they can edit the note (currently = 60 days). After that window passes, the note is locked as part of the historical case record.

To Do Lists

Description: To Do Lists are advocacy items or tasks assigned to the child's advocate within the case. The To Do item can be added by any member of the Advocacy Team.

The to-do list displays the following information:

- Assigned To
- Relates To
- Subject
- Due
- Case Name
- Category
- Status
- Priority

There are a variety of ways to sort the To Do items, including (but not limited to) a specific case, the person the task is assigned to, the type of task, the task priority and when it is due.

* ACTION REQUIRED * Training Logs (see separate cheat sheet)

Description: Volunteers are required to enter the In-Service Trainings they attend. Once a training record has been entered, it will be displayed in the training logs section, awaiting approval by the supervisor.

Calendar

The calendar is for use within Optima only. It is populated by entries in Optima, such as upcoming Hearings, or Trainings. You can also add new calendar items by double clicking on a date in the calendar. Due to confidentiality issues with email providers, this calendar cannot link to your Outlook calendar.

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Optima Cheat Sheet

ENTERING A CASE CONTACT

1. Log in to Optima. Scroll down on the main screen. The default tab selected will be “Cases”.
2. On the right side of the line as the case for which you want to enter a note, click on the pen & paper icon. This will launch a new contact form.
3. Begin on the left side of this form with the date. Change date if activity or contact occurred on date other than today. (requires a 4-digit year)
4. Select activity type from the drop-down list.
5. Enter a short subject line that best describes the activity or contact. (OPTIONAL)
6. Select a contact type from the drop-down list.
7. Enter the number of hours to nearest ¼ hour.
8. Enter mileage and expenses, if applicable. (OPTIONAL)
9. Enter a narrative of your contact. This space is limited to 5000 characters. The box will turn red if the character limit is exceeded. You will NOT be able to save the contact note when any box is red. (SEE ATTACHED “*visitation summary checklist*” FOR GUIDELINES OF WHAT TO INCLUDE FOR HOME VISIT CONTACTS)
10. On the right side of the form, select case participants that were involved in this contact or activity by checking the box next to the name.
11. List others contacted, if applicable. (OPTIONAL)
12. Click green “Create” button.

Copying and Pasting from an Email

You are able to copy and paste text from an email directly into the narrative section in Optima.

These are two common issues and suggested solutions:

- If 5000 character limit is exceeded, try deleting blank/empty lines.
- If error message launches, try removing hyperlinked email addresses from the text that is pasted into the narrative section of your note.

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Optima Cheat Sheet

ENTERING IN-SERVICE HOURS

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 $\frac{1}{4}$ 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.

Did you Know?

You can now see your in-service total! 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.

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Visitation Summary Checklist

Please note the following during your home visit with the child/children on your case:

NAME OF CHILD VISITED

DATE/LOCATION OF VISIT

PLACEMENT

- Who is the child's current caregiver?
 - Name
 - Address
 - Telephone No.
 - Email
- Note other persons contacted during visit
- Did you tour the home?
- Did you see the child's sleeping area?
- Comments regarding home and/or child's sleeping area
- Does the caregiver have any comments/concerns?
- Note any of your own general comments regarding the caregiver/placement.

SCHOOL/DAYCARE

- What school/daycare does child attend?
- Comments regarding school/daycare.

MEDICATION

- Is child on medication?
- Describe medication & any side effects.

HOUSEHOLD INTERACTION

- Did you observe interactions between the child & caregiver/other household members?
- Comments regarding household interaction/family time.

PRIVATE DISCUSSION

- Did you speak with the child privately?
- Did the child express any wishes to you?

SUMMARIZE CONCERNS/ACTION ITEMS

- Additional comments.
- Are there items to follow-up on with your CAM?

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