



OPTIMA - Volunteer Information Guide

**Indiana State Office of GAL/CASA
Office of Court Services
Indiana Supreme Court
251 North Illinois Street, Suite 800
Indianapolis, IN 46204**

800-542-0813

Evinto Solutions 2018 © All rights reserved.

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used only in accordance with the terms of those agreements. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or any means electronic or mechanical, including photocopying and record for any purpose other than the purchaser's use without permission of Evinto Solutions, LLC.

Optima® is a registered trademark of Evinto Solutions, LLC

*Evinto Solutions, LLC
3120 W. Carefree Highway #1-698
Carefree, AZ 85086
Website: simplyoptima.com*

Main Screen for Volunteers



Volunteers
Dashboard



Help

Address Book

Personal Info

Cases





To-Do List

Training Logs

Non-Case

Calendar

“Shortcut” – to enter a Contact Log, click on the icon on the same line as the Case Number

Case Number ▲	Case Name ▲	Petition Date ▼	Action
95G8-1501-JC-00004/5/6	Carter-Wilson	8/1/2015	 
95W08-1502-JC-097332	Graham	5/25/2015	 

1

Displaying items 1 - 2 of 2

Your case(s) will appear here.
Click on the **blue** Case Number to access details.

Main Screen for a Case

Basic Case Information

CASE DETAILS

Case Information

Edit

Case Number: 88C88-1301-JC-000001/2
Case Name: Bumstead
County: Adams
Jurisdiction:
Priority Case?
Petition Date: 10/1/2018
Notes:

Legal Status

Add

Type ▲	End Date ▼	Action
No records to display		





Displaying items 0 - 0 of 0

The Legal Status section is not used in Indiana

This section displays the name of the volunteer(s), and supervisor, who are assigned to the case. It also shows the dates the people were assigned.

Case Assignments

Add





Name ▲	Type ▲	Supervisor ▼	Assigned ▼	Released ▼	Reason ▲	Contact Info ▲	Action
Supervisor, Sally	Supervisor	<input checked="" type="checkbox"/>	1/1/2013			317-831-4562 supervisor@mycounty.in.gov	 
Jones, Harry	Volunteer	<input type="checkbox"/>	2/3/2019			317-998-7744 jonesharry@indyhonda.com	 

1

Displaying items 1 - 2 of 2

Children in Case

Add





Name ▲	AKA/Alias ▲	Gender ▲	Child Age ▲	Close Date ▼	Volunteer ▲	Supervisor ▲	Next Hearing ▼	Action
Bumstead, Alexander		Male	2		Jones, Harry	Supervisor, Sally		 
Bumstead, Cookie		Female	1		Jones, Harry	Supervisor, Sally		 

This section displays the names of the child/children, gender, birthdate, volunteer, and supervisor.

This section displays location where each child is currently placed.

Current Placements

Add





Name ▲	Placement ▲	From ▼	Reason ▲	With Siblings ▲	Contact Name ▲	Contact Info ▲	Action
Carter, Carmen	Youth Opportunity Center	11/2/2015	Court Ordered	All	Vandenbark John	765-677-4600 jvandenbark@YOC.i...	 
Carter, Connie	Youth Opportunity Center	11/2/2015	Court Ordered	All	Vandenbark John	765-677-4600 jvandenbark@YOC.i...	 

1

Displaying items 1 - 2 of 2

Family Members

Add

Name ▲	AKA ▲	Relationship ▲	Active ▲	Deceased ▲	Contact Info	Action
Alvarez, Juan-Diego		Father	<input type="checkbox"/>	<input type="checkbox"/>		 
Carter, Mary		Mother	<input checked="" type="checkbox"/>	<input type="checkbox"/>	317-983-5716	 

1

Displaying items 1 - 2 of 2

This section lists the family members involved in the case.

This section contains several “tabs” – volunteers primarily use:
Contact Logs – Documents - Hearings

Navigation tabs: Contact Logs | Associated Parties | Wellbeing | Documents | Petitions and Allegations | Hearings | Placement History | Case Closing Information




Buttons: View Notes | Search

Name	Type	Subject	Date	Hours	Status	Action
Supervisor, Sally	Contact with Child/ren	Second Test, same as before	1/25/2019	3	Approved	🔍 ✖
Supervisor, Sally	Contact with Child/ren	Peas and potatoes	1/25/2019	6	Approved	🔍 ✖

Contact Logs are used to enter notes of visitations, court hearings, track time, and hours.

The Documents section is where all the court documents, CASA reports, and other case- related papers are stored.

Contact Logs Associated Parties Wellbeing Documents Petitions and Allegations Hearings Placement History Case Closing Information

File Name ▲	Document Date ▼	Add Date ▲	Document Type ▲	Action
Permanent Plans.docx	1/14/2019	2/24/2019	Order Approving Permanency Plan	  

The Hearing section lists all of the upcoming hearings, and also a history of previous hearings details.

Contact Logs Associated Parties Wellbeing Documents Petitions and Allegations Hearings Placement History Case Closing Information

Date ▼	Time ▼	Report Due ▼	Location ▲	Hearing Type ▲	Judge ▲	Status ▲
6/6/2018	11:45 AM		Circuit Court	Review	Judge Judy	Held - Completed



Contact Log

Case Number: 00C01-1610-JC-000555/556/557

Case Name: Adams

Activity Date: 1/17/2017

Activity Type: Child And Family Team Meetin

Subject: Team Meeting at Library

Out of Court:

Contact Type: Face-To-Face

Hours: 2.5

Mileage:

Expenses: \$0.00

Notes: Team meeting was very productive. Seems like the mother is doing well with her addiction issues. Dad has found a new job, his therapist says John's attendance is perfect. Next CFTM meeting set for March 23 at the DCS office, 4:30 p.m.

(234 out of 5000)

Cancel

Create

Create when finished

Contact Logs-1

Date the activity took place

Title (optional)

Number of hours/miles

Log notes

Type of activity

Type of contact

Contact Logs-2

Individuals contacted

Enter names of
others who were
contacted

Select	Contacted	Party Type
<input checked="" type="checkbox"/>	John Socialworker	Caseworker
<input type="checkbox"/>	Bob Benton	Child
<input type="checkbox"/>	Charlie Cramer	Child
<input type="checkbox"/>	Felix Adams	Child
<input checked="" type="checkbox"/>	Beth Benton	Family Member
<input checked="" type="checkbox"/>	John Johnson	Family Member
<input checked="" type="checkbox"/>	William Tell	Family Therapist

Others Contacted:

First Name

Last Name

Relationship

First Name

Last Name

Relationship

First Name



Last Name

Relationship

Contact Logs-3

Contact Log Pending Approval

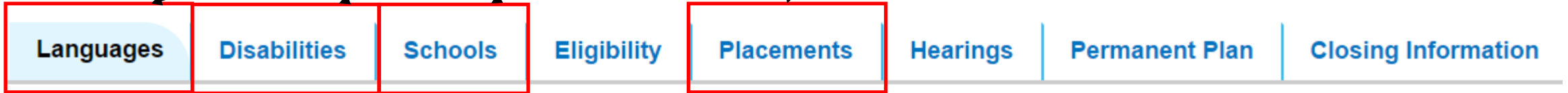
Name	Type	Subject
Davidson, Dottie	Child And Family Team Meeting (CFTM)	Team Meeting at Library

Date	Hours	Status	Action
1/17/2017	2.5	Pending	  

**OPTIONAL SLIDE
DEPENDS ON
LOCAL PROGRAM
PREFERENCES**

CHILD INFORMATION

Volunteers can update Languages, Disabilities, Schools, and Placements



Add

Language ▲

Primary Language ▲

No records to display.



FAMILY MEMBERS

FAMILY MEMBER information can be updated. Please use the Notes box to indicate when you make an update.

OPTIONAL SLIDE DEPENDS ON LOCAL PROGRAM PREFERENCES

Edit Family Member Details

First Name

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 Type

Substance Abuse

Single Parent Home

Deceased

Active

Notes

(0 out of 5000)

FAMILY MEMBERS

Volunteers can update Relationships, Languages, Disabilities, Concerns, and Employment

OPTIONAL SLIDE
DEPENDS ON
LOCAL PROGRAM
PREFERENCES

Relationships | Languages | Disabilities | Concerns | Employment

Child

Add

First Name ▲	Last Name ▲	Relationship ▲	Action
No records to display.			

◀◀ ◀ ▶ ▶▶

ASSOCIATED PARTIES

Volunteers can add caseworkers, attorneys, and interested persons to the case. These individuals must have been previously entered into the Optima system.

OPTIONAL SLIDE
DEPENDS ON
LOCAL PROGRAM
PREFERENCES

ADD TO CASE

Associated Party

Case Smith - 84C01-1701-JC-000024

Party Type Attorney Caseworker Interested Party

Associated Party << Select Party Type >> ▼

DOCUMENTS

Volunteers can upload documents.

OPTIONAL SLIDE
DEPENDS ON
LOCAL PROGRAM
PREFERENCES

 ADD

Document

Case

Smith - 84C01-1701-JC-000024

File Name
(Ctrl+click to multi-select)

No file chosen

Document Type

<< Select Type >> ▼

Document Date

5/11/2017



Cancel

Save