

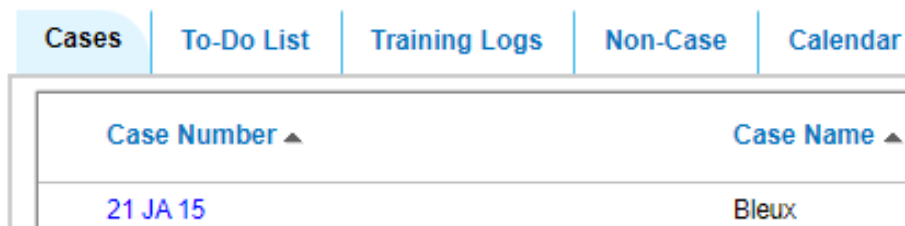
## Enter a Contact Log into Optima

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.

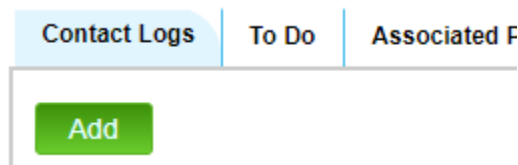
Note: everything entered in Optima is only accessible to CASA (i.e., the court does not have access to our Optima notes). Enter information fully, without concern about formatting or whether an outside party could access (they can't!).


Once you enter information, your Advocate Manager will “Approve” or “Deny” your entry. If your entry is marked “Deny,” please read the comments at the end of the Notes section and re-save your entry for further approval.

- Click the **Cases** tab.




- Click the case number in blue text (e.g., *21 JA 15*).
- 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 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
    - If *any* part of the interaction touched on educational advocacy, select an entry referring to educational advocacy (e.g., *Child Visit Plus Educational Advocacy*)
  - **Subject:** enter a brief description of interaction
  - **Out of Court:** click checkbox as appropriate
  - **Contact Type:** select from the list

- **Hours:** enter amount of time using quarter hour increments (e.g., 0.25, 0.5, 0.75, 1.0). 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 with **everyone** you interacted for this entry. Always include the **child**(ren) for all Contact Log entries since the contact is about the child, regardless of presence at interaction.
- If a person is not listed (e.g., schoolteacher), enter the **First Name, Last Name,** and **Relationship** to the child.

Click **Create**

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

If you have a “Deny” status, open the entry and follow any instructions in the **Notes** section. Once you save the entry, it is again sent to your Advocate Manager.