**https://il-lake.evintosolutions.com**

**“Personal Information” tab – How to Update Your Information**

Select "Personal Info"

 Demographics Section

 a. Select "Edit" to update personal information

 Emergency Contacts Section

 a. Select "Add" to enter a new contact

 b. Select the "Edit Contact" action icon to update an emergency contact

 Employment Section

 a. Select "Edit" to update current information

**“Cases” tab –**

**View Case Details**

Open the case by clicking on the case number or magnifying glass icon. Under “Case Details,” scroll down to see Case Information, Case Assignments, Children in Case, Current Placements, and Family Members. If you see anything that needs to be added or revised in these fields, contact your manager.

At the bottom of “Case Details,” find tabs (Left to Right) for Contact Logs, To Do, Associated Parties, Documents, Petitions & Allegations, Hearings, and Placement History

In the "Contact Log" tab, you can see all existing Contact Logs (your Process Notes). Choose “Add” to start another note…or use the shortcut on the Volunteer Dashboard to create a new Contact Log (see below).

**How to enter a New Contact Log (Process Notes) on a case**

In the Volunteer Dashboard, select "New Contact Log" (the “pencil and paper” icon to the right of the case number and name), then complete the following prompts:

1. Enter the Activity Date
2. In the box on the right, check who you contacted/met. If it was someone not listed in the box, you can add them below the box under “Others Contacted.”
3. Enter Activity Type from drop down menu. If the Activity was Visited the Child and, during the visit, you *also* engaged in Educational or Medical advocacy, then instead choose Visited the Child & Educational Advocacy (or Visited the Child & Medical Advocacy).
4. Complete the Subject, Contact Type, Hours, Miles, and Notes (your Process Notes to your manager)
5. Select "Create"

Contact Log Style Tips

* For all Contact Logs make “Subject” as specific and consistent as possible (e.g. CW Communication, Visit with *Name of Child*, School Communication). This will allow you to create reports to view Contact Logs by Subject.
* Enter partial hours spent on activity as follows:
	+ For 15 minutes enter .25 (hours)
	+ For 30 minutes enter .50 (hours)
	+ For 45 minutes enter .75 (hours)
* “Notes” are the Process Notes that you previously emailed to your manager. You can type up to 5,000 characters. If you need to type more, you can change the Subject to indicate that (e.g. 1 of 2)
* If you need to step away from your Process Notes for a while, select “Create” to save your work. Optima does not save automatically!

Interacting with your manager via Optima Contact Logs

**Important:** Create your Contact Log as soon after the activity as possible – preferably the *same day*

Once you create a “Contact Log,” your Advocate Manager can view that entry. The contact log will show as “Pending” until your manager “Approves” or “Denies” it. If there are no corrections or questions about the entry then it will be “Approved.” If your manager has questions or comments then it will be “Denied” in order to give you a chance to respond. After all questions are answered, and your manager approves it, the Contact Log can no longer be edited/revised.

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**“Cases” tab: Documents for your Case**

 Go to the Documents tab (Inside the Cases tab, at the bottom of Case Details)

To View documents

You will see a list of case documents inside the Documents tab. To view, click on the magnifying glass icon (“Get Document”). The document will not open, but will download onto your computer, after which you can open it.

To Upload documents

1. Select Document tab
2. Select “Add” icon
3. Under File Name, choose the file to be uploaded from your computer Documents
4. Choose the Document Type from the dropdown list
5. Enter the Document Date, update the date as necessary

Optima allow documents that are 5MB (5000kb) or smaller to be uploaded. Documents larger than this can't be uploaded. If you have a larger document there are two options:

1. A document can be split into two documents and loaded as part one and part two. Some programs do this to make it easier to scroll through each document. It is easier to look through 10 pages than 20.
2. If you are scanning: documents that are scanned in a higher resolution are bigger (more MBs). Try scanning the document at a lower resolution (200 dpi is ideal). Scan documents in B & W (no color).

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**“Training Log” tab - Entering Continuing Education (CEUs)**

Select "Add"

* + - 1. Add the Schedule Date
			2. Add the Complete Date (same as Schedule Date)
			3. Choose from the Training Topic dropdown menu
			4. Choose from the Training Format dropdown menu
			5. Add Hours (for CASA-hosted events, see CASAGram or event flyer for number of CEUs earned)
			6. Add Mileage (if you travelled to the event)
			7. Important: in “Notes” type the specific event attended, e.g.“Teen Panel”, “Waukegan Gang Unit,” “Book Club.”

Until your manager views/approves the CEU entry, it will show as Pending and the hours will not be included in the Total Year to Date number.

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**Entering Non-Case Volunteer Activity**

Non-Case tab at the bottom of Volunteer details

1. Select "Add"
2. Enter Date
3. Select Activity from drop down list
4. Enter Hours spent on the Activity
	1. For 15 minutes enter .25 (hours)
	2. For 30 minutes enter .50 (hours)
	3. For 45 minutes enter .75 (hours)
5. Enter Mileage
6. Enter details about the activity in the Notes (e.g. front desk, gala help, administrative help)
7. Select "Create"

**Other Tabs:**

There are three features for your personal use; **Address Book, To-Do List and Calendar**. They are optional - use these if you would like. Your Advocate Manager will not see these entries.