

Optima Contact Log Suggested Guidelines

Activity Type –

Should *always* be “Case Contact”

Regular visits with your child are considered case contact as well as ADA, ICWA, DHS, Court, teachers, counselors, attorneys, CASA staff, etc. Make sure to log any time you spend volunteering, including: visits, calls, reviewing notes, writing your reports/emails or contact with anyone involved in the case including CASA staff. Include drive time!

Contact Type –

Contact type will be whatever the contact was, phone, face to face, facetime, video-conference, email etc.

Check Box of Contact –

Always make sure the person whom you had contact with is marked in the box that lists all parties, associated parties, and family members. IF a name is missing such as a teacher or counselor, we must add under associated parties to receive contact credit for that contact. Please notify your supervisor if someone is missing from the list of contacts so they can be added.

Only check boxes for individuals you have direct contact with. Do not include who you talk about.

Contact with staff – always click the checkbox for “CASA Staff”. The lines items with vol/supv/atty do not populate in reports.

Subject -

In the subject line list the title of your contact. DHS, Child, Bio Mom, Supervisor, Court, Bio Dad, Foster Parent, Visit Child, etc.

Hours –

Must be entered and rounded up to the nearest quarter hour (.25, .50, .75,1)

Mileage –

We do not require volunteers to track mileage. However, if you would like to write it off on your taxes, please keep this section filled out and request a mileage report from your supervisor at the end of the year.

Notes –

This is optional if you are keeping notes in your file. It is easier for your supervisor to have them put into Optima, just in case you are not able to write your court report, or if the information is needed. This also keeps them in the loop.

Case Supervision -

Is for supervisor use only. When supervisors make contacts, with volunteers, Case Supervision is used.