

Enter School Information into Optima

Optima stores annual school information for each child. This includes the child's grade, school, IEP/504 status, and any helpful school contact info.

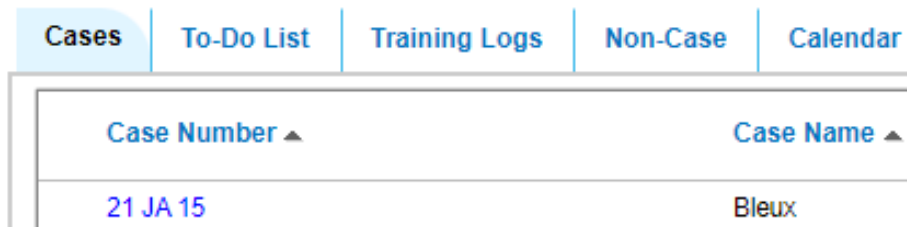
Update school information every year and whenever a child changes school. Include daycare and preschool information.


Find instructions below for:

- Locate School Information
- Enter or Update IEP/504 Information
- Enter New School Information
- Update School Information

Locate School Information

- Click the **Cases** tab.



- Click the case number in blue text (e.g., *21 JA 15*).
- Scroll to the section **Children in Case**.
- Click the magnifying glass () to the far right of the child's name.
- Scroll to the bottom of the page, and select the **School** tab.



Enter or Update IEP/504 Information

- If the child has an IEP or 504, edit the **IEP** section:
 - Click the **Edit** button.
 - Select **YES** for the IEP. (Select **YES** even if the plan is a 504.)
 - Update the **Renewal Date**.
 - Click **Save**.


Enter New School Information

- In the **School History** section, click the **Add** button to begin a new entry.
- Select the **School** from the list. (If the school is not listed, contact your Advocate Manager to have it added. You will not be able to finish adding the school information until it is added to the list.)
- Enter the **Grade**. Use only these one/two digit codes:

00 - Daycare/early childhood	05 – Grade 5	12 – Grade 12
PK - Pre-Kindergarten	06 – Grade 6	Fr - College Freshman
K - Kindergarten	07 – Grade 7	So - College Sophomore
01 – Grade 1	08 – Grade 8	Jr - College Junior
02 – Grade 2	09 – Grade 9	Sr - College Senior
03 – Grade 3	10 – Grade 10	
04 – Grade 4	11 – Grade 11	
- Enter the **School Start Date**. If you are unsure of the exact start date at the beginning of a regular school year, use a mid-August date.
- The **School End Date** should be updated when the school year ends and/or the child transfers from the school.
- Select the **School Transfer Reason**.
 - Use *No Change from Last Year* when updating information for a grade-level change at the same school.
 - Use *Grade Appropriate Change* when updating information for grade-level change within the same school system.
 - Use *Graduation* when a child graduates from 12th grade.
 - Use other options as appropriate.
- Click **Transfer Supported** if CASA supports the switch in schools. If CASA believes the child should have stayed at the previous school, do not click this button.
- If available, enter useful information for **Contact Name**, **Contact Title**, **Contact Phone**, **Contact Email**, and **Notes**. Additional information may be useful for educational advocacy with the teacher, social worker, or other persons.
- Click **Create**.

Update School Information

Update when the school year ends or when a child changes schools mid-year.

- To update school information, click the paper/pen icon () to the far right.
- Enter information in all pertinent fields. (See above for specific details.)
- Click **Save**.

After updating school information, you may need to add information for the new school or the next grade. (See instructions above.)