
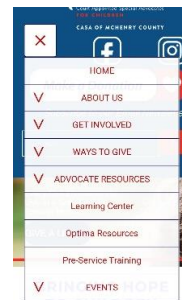


Using Optima While You Are Out and About? – Use *OptimaGo*!

OptimaGo is a mobile-friendly look for selected *Optima* functionality. *OptimaGo* allows you to access *Optima* from your device with an easier interface than using full application on a small screen.

How does it work?

1. Log into a secure wi-fi network or use your device's data
2. Access the *Optima* Login through the **CASA McHenry County** webpage, under **Advocate Resources / Optima Resources** (<https://www.casamchenrycounty.org/general-4>)
Note: do *not* simply search the web for *Optima* or *OptimaGo*
3. Click on the **Optima Login (Advocates Only)** button 
4. On the *OptimaGo* login page, enter the same **Username** and **Password** you normally use
5. Click **Login**
6. Once you access *OptimaGo*, create a shortcut on your phone for easier future access




How do I navigate in *OptimaGo*?

Use the buttons at the bottom of the screen:



- **Home** displays your calendar, including report due dates and court hearings
- **My Cases** provides access to your CASA case
 - **View Notes** for Contact Logs
 - **+ Contact Log** to add a new entry, making copy and paste from texts especially easy
 - **View** Associated Parties to find a caseworker's phone (or other person)
 - **View** Documents to review court orders, including your Order of Appointment court order
Note: remember to delete any documents downloaded to your phone for confidentiality
 - **View** Hearings to see what occurred during court
- **Go To Site** leaves *OptimaGo* and opens the full *Optima* site

How do I enter a new Contact Log?

1. Touch **My Cases** as the bottom of the screen.
2. Touch your assigned case.
3. Touch **+ Contact Log** on the right side.
4. Touch **Activity Date** and select the date from the calendar. Touch **Set**.
5. Touch **Activity Type** and select the appropriate option.
6. Touch **Subject** and type a subject line for the new contact log.
7. If the contact occurs outside of the court room, touch the slide button for **Out of Court**.
8. Touch **Contact Type** and select the appropriate option.
9. Touch **Hours** and enter a number in 15 minute increments, e.g., .75 for 45 minutes.
10. Touch **Mileage** and enter a number.
11. Touch **Expense** and enter a number.
12. Touch **Notes** to enter text about the contact. Use any of the following methods:
 - a. Type using the keyboard
 - b. Touch the microphone icon and *orally transcribe your notes* 
 - c. Navigate to email or text to copy information
Navigate back to the Contact Log
Touch and hold in the **Notes** section until the **Paste** option appears
13. Touch the slide button for individuals the note **Pertains to**, including yourself and the child.
14. When finished, touch **Save** in the top right corner.