

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 the 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 our website (<https://casamchenrycounty.org/advocate-resources/>)
Note: do *not* simply search the web for *Optima* or *OptimaGo*
3. On the *OptimaGo* login page, enter the same **Username** and **Password** you normally use
4. Click **Login**
5. Once you access *OptimaGo*, create a shortcut on your device for easier future access



The image shows a mobile login form for OptimaGo. It has a header with the OptimaGo logo. Below the logo are two input fields: 'Username' and 'Password'. A blue 'Login' button is positioned below the password field. At the bottom of the form, there is a small link that says '<-- Go to Desktop Site -->'. The form is set against a white background with a light blue border.

How do I navigate in *OptimaGo*?

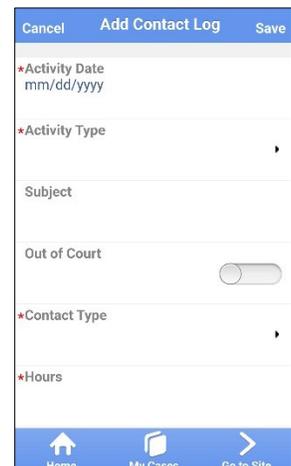


Use the buttons at the bottom of the screen:

- **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: for confidentiality, remember to delete any documents downloaded to your phone
 - **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 with *OptimaGo*?

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 appropriate, 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



The image shows a mobile form titled 'Add Contact Log' with a blue header containing 'Cancel', 'Add Contact Log', and 'Save' buttons. The form has several input fields: '*Activity Date' (mm/dd/yyyy), '*Activity Type' (with a dropdown arrow), 'Subject', 'Out of Court' (with a toggle switch), '*Contact Type' (with a dropdown arrow), and '*Hours'. At the bottom, there is a blue navigation bar with 'Home', 'My Cases', and 'Go to Site' buttons.

