

Optima Contact Logs Guide

These are **minimum requirements** for the contact log entries.
Logs must be entered by the last day of each month.

Activity Type, Contact Type, Subject, and Notes are all data fields in the Optima contact log.

When entering contact logs, be sure to check mark the appropriate parties in the box to the right of the screen.

Required preliminary contacts after case assignment:

Contact Description	Optima Fields			
	Activity Type	Contact Type	Subject	Tasks – Information to include in Notes Section
Initial meeting with CASA supervisor	Case Supervision	Face-to-face *don't forget to include mileage	Case assignment	Meet with supervisor and accept case
Intro email to "Associated Parties"	Caseworker contact	Email	Intro- Caseworker	Email all associated parties introducing yourself, providing best contact information
	Attorney contact	Email	Intro- all attorneys	Email all associated parties introducing yourself, providing best contact information; ask parent attorneys if they want to be present when you meet with their clients
Read Optima documents and contact logs	Case research	Letter/written documentation	Reviewed case in Optima	Review documents, logs, associated parties, mark calendar with hearings, take down placement contact info
Set up initial visit	Placement contact	Phone	Schedule first visit	Call placement to schedule first child visit
First child visit *Half of your visits for the year (6) <i>must</i> occur at the child's placement	Child contact	Face-to-face *don't forget to include mileage	Initial visit	Detail your visit with the child; note demeanor, what the child likes to do, observe child's room
	Placement contact	Face-to-face *do not duplicate mileage and time in both logs	Initial visit	Write down names/contact info for the child's service providers so you can reach out to them independently (e.g., doctor, dentist, therapist, teacher, daycare, psychiatrist); If foster placement, ask for name of foster agency and their case manager's contact info; If this is a kinship placement (with a relative or fictive kin), ask caregiver who the kinship worker is and for their contact info

Required monthly contacts:

Contact Description	Optima Fields			
	Activity Type	Contact Type	Subject	Tasks – Information to include in Notes Section
Child visit	Child contact	<p>≤ 2 hours away = monthly face-to-face</p> <p>2-3 hours away = monthly phone contact & quarterly face-to-face</p> <p>≥3 hours away = monthly phone contact & 2x/year face-to-face</p>	Monthly visit	Detail visit with child; note demeanor; what you discussed; any concerns
	Placement contact (include this additional log if placement caregiver is present)	Face-to-face	Monthly visit	Ask if there are any new concerns or questions; note any new medical/therapy appointments; note any changes or developments at school or daycare
	Education (include this additional log if the visit is at school or daycare)	Face-to-face	Monthly visit	Include what information you gathered, which teachers or school personnel with whom you spoke; can refer to documents uploaded to Documents tab in Optima
	Visitation observation (include this additional log if monthly visit was observing parent-child visit)	Face-to-face	Monthly visit-visit observation	Include observations about child’s behavior/interaction (e.g., happy to see parents, sad when visit ended), overall demeanor, include parents’ appropriateness with child, parents’ behavior/emotions
	Parental contact (include this additional log if monthly visit was observing parent-child visit)	Face-to-face	e.g., visit with mother, visit with father, visit with both parents	Can copy and paste notes from Visitation observation in Optima contact log
Contact CPS caseworker	Caseworker contact	Contact type varies	Monthly check-in	Best way to accomplish this task: After each monthly child visit, email AAL and caseworker- briefly let them know how the visit went, express any concerns, ask any questions, ask them if they have any questions or concerns
Contact child’s attorney	Attorney contact	Contact type varies	Monthly check-in with AAL	Same as above; can copy and paste same notes
Check-in with CASA supervisor	Case supervision	Contact type varies	Monthly check-in	Ask questions; guidance; any issues
Placement contact	Placement contact	Contact type varies	Monthly check-in	Schedule visit; if not visiting at the placement that month, obtain updates on providers, any questions or concerns
Contact therapist	Psychological/mental health	Phone/email	Therapy update	Obtain goals of therapy, progress, and request therapy notes

Required contacts every three months: In addition to each contact description listed on page 2, you must also record each of these contacts every 3 months

Contact Description	Optima Fields			
	Activity Type	Contact Type	Subject	Tasks – Information to include in Notes Section
Contact school/daycare	Education	Phone or email	Education update	Contact school to obtain counselor, teacher contact info, reach out to those individuals to obtain behavior reports, academic progress reports, ask how student does in class; if receiving special education services or entitled to 504 accommodations, contact teacher, guidance counselor or ARD facilitator to determine next meeting and obtain copies of IEP/504 documents and upload to Optima Documents
Contact doctor	Physical/behavioral health	Phone	Medical update	Call doctor's office; ask about past appointments dates and upcoming appointments; if there are any concerns; if child has been referred to any specialists *CASA supervisor can fax court order and notice for you beforehand if you ask (applies to all medical/therapy providers)
Contact dentist	Physical/behavioral health	Phone	Dental update	Call dentist's office; ask for date of most recent appointment and upcoming appointments (next routine cleaning); any concerns; ask if referred to orthodontist or other specialist
Contact psychiatrist	Psychological/mental health	Phone	Psychiatry update	Contact psychiatrist and ask what medications child is prescribed, when next medication review is; how often appointments are
Contact parent or parent attorneys	Parental contact <i>*Attorney contact if no permission to contact parents directly</i>	Phone or email	Service plan update	Ask about parent progress on service plan
Contact ongoing parent service providers	Case research	Varies	Service plan update	Complete contact log for each service provider contacted regarding parent progress on service plan; do not need to contact providers or services that have already been completed
Meeting with CASA supervisor	Case supervision	Face-to-face	Quarterly meeting	Ask questions; guidance; updates from supervisor
Follow up with CPS kinship caseworker or foster agency	Permanency	Phone or email	Licensing update	Contact kinship worker or foster agency; follow up on progress with Fostering Connections or progress with becoming licensed

Required other contacts:

Contact Description	Optima Fields			
	Activity Type	Contact Type	Subject	Tasks – Information to include in Notes Section
Attending court or mediation	Attended hearing/court	Face-to-face *don't forget mileage	Type of hearing (e.g., Status Hearing, Permanency Hearing, Pre-trial Mediation)	Note parties in attendance, any new orders, next hearing dates; refer to document uploaded to Documents tab in Optima
Permanency Conference (PC), Family Group Conference (FGC), Circle of Support (COS)	Permanency	Face-to-face (or phone)	e.g., PC, FGC, COS	Refer to document uploaded to Documents tab in Optima
Case staffing with CPS	Staffing/team meeting	Face-to-face (or phone)	Staffing with CPS	Detail what was discussed, what next steps are; deadline for completing follow up
Preparing and writing court report	Court report: prep and/or writing	Letter or written documentation	Court report	Write and edit court report; report due to CASA supervisor for review and further editing <u>3 weeks (15 business days)</u> prior to court hearing date