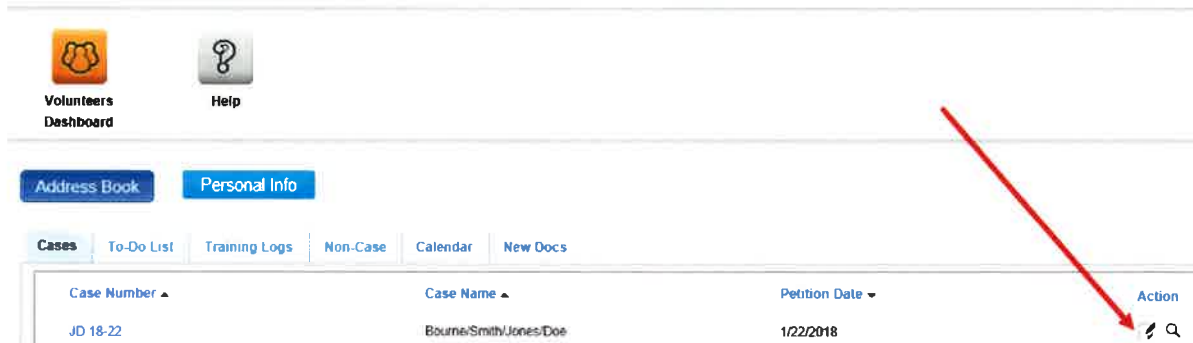


Cheat sheet for Oklahoma State Outcomes

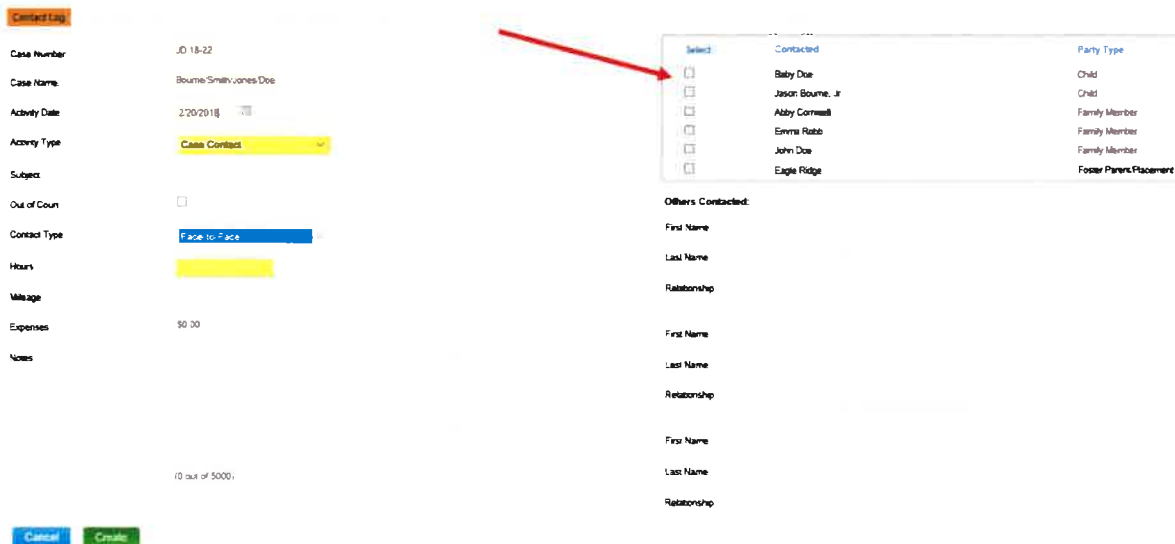
Volunteer Contact Logs

1. To enter a volunteer contact with hours and mileage for a volunteer, **you must log into Optima as the volunteer**. The volunteer will need to be set up in User Admin first. You can leave the password as the default password of 123456.

2. From the volunteer's dashboard, you can open a new contact log by clicking on the paper and pencil in the Action column next to the case for when you are entering a contact.



3. Enter the Activity Date and Type for a volunteer contact - always select Case Contact in the Activity Type field. Enter the Contact Type, Hours, Mileage (if any), any Notes (if any) and check the box next to the name of the person(s) contacted. Then click Create.



4. Optima is set up for contact logs to be entered individually, as they happen. If you are trying to enter an entire month's worth of contacts, each check mark next to a name on the right side only counts as one contact. You will have to create multiple contact logs –

NOTE: The screenshots shown on these pages are taken from made-up cases in the training database and do not show the names of actual children, cases, volunteers, or family members.