

REFRESHER TRAINING

Optima offers program staff who have completed their basic training two different series of free, live webinars.

Refresher Training is for any program staff who wants a quick review, reminder or boost. These modules are designed to go over the different steps of Optima processes.

Your Refresher Training includes:

- A fast review of the most common tasks and responsibilities in Optima,
- Time limited - just 50 minutes! - and offered monthly,
- Engaging webinar formats with a live instructor,
- Multi-program format to encourage sharing of best practices!

Refresher Training is designed to be a “tune-up” for staff who have already been trained. Program staff who just want a quick review, a better understanding or want to check in will benefit greatly from the Refresher Training Series.

There are two different tracks: “Back to Basics” and “Beyond the Basics”

Back to Basics reviews the essentials of data entry and Optima usage. There are eight classes:

- Effective and Efficient Case Initiation
- Step by Step Case Releases and Closures
- Inquiries and Applications
- Maintaining Look Up Tables, and User Administration
- Supervision in a Snap
- Maximizing your Staff Dashboard – Volunteer Edition
- Maximizing your Staff Dashboard – Caseload Edition
- Getting Ready to Train Advocates on and With Optima

Beyond the Basics expands Optima fundamentals coverings more advanced practices. There are nine classes:

- Improving Your Application Process
- Teaching and Building Advocacy Plans (To Dos)
- Effective Marketing and Recruiting with Optima
- Data Succession and Program Continuity Planning with Optima
- Creating Useful and Lasting Optima Training for Advocates
- Troubleshooting Issues in Optima and Getting Help
- Setting Up and Utilizing Your Optima Training Database
- Tracking Program Trends with Optima
- Understanding Critical Data and Reports for New Staff

The next pages will assist you in finding and registering for the classes you want to attend.

Back to Basics

Module Title	Effective and Efficient Case Initiation
Length	50 minutes
Module Goals	• Learn to enter case information quickly • Identify Critical Data Fields • Develop a plan for shared data entry with advocates
Registration	Register Here!

Module Title	Inquiries and Applications
Length	50 minutes
Module Goals	• Develop a strategy for keeping inquires engaged • Define key Application questions • Develop a plan for tracking marketing information
Registration	Register Here!

Module Title	Supervision in a Snap
Length	50 minutes
Module Goals	• Review the Supervisor Dashboard Components • Build a Supervision plan • Develop a plan for shared data entry with advocates
Registration	Register Here!

Module Title	Maximizing your Staff Dashboard – Caseload Edition
Length	50 minutes
Module Goals	• Understand the Caseload tab • Identify Critical Data Fields • Develop a plan for shared data entry
Registration	Register Here!

Back to Basics (cont.)

Module Title	Case Releases and Closures
Length	50 minutes
Module Goals	• Learn to release professionals and advocates • Identify Critical Data Fields • Close children and cases efficiently and effectively
Registration	Register Here!

Module Title	Maintaining Look Up Tables, and User Administration
Length	50 minutes
Module Goals	• Keeping the Look Up tables up-to-date • How to add, change, edit and delete descriptors • Maintain a secure database through User protocols
Registration	Register Here!

Module Title	Maximizing your Staff Dashboard – Volunteer Edition
Length	50 minutes
Module Goals	• Learn to manage Volunteer Records • Understand Background check clocks and timers • Discharge Volunteers effectively
Registration	Register Here!

Module Title	Volunteer Breaks (On Leave) and Discharges
Length	50 minutes
Module Goals	• Developing a process for Advocates going on leave • Making breaks part of volunteer retention • Closing out a volunteer record efficiently
Registration	Register Here!

Beyond the Basics

Module Title	Improving Your Application Process
Length	50 minutes
Module Goals	• Review Application Configuration • Develop an application review process • Understand application as part of recruiting
Registration	Register Here!

Module Title	Teaching and Building Advocacy Plans (To Dos)
Length	50 minutes
Module Goals	• Learn to construct To Do tables • Develop models of services • Construct Advocacy Plans
Registration	Register Here!

Module Title	Effective Marketing and Recruiting with Optima
Length	50 minutes
Module Goals	• Learn the reports to track recruitment and retention • Develop a recruitment plan based on data • Organize data for marketing analysis
Registration	Register Here!

Module Title	Creating Useful and Lasting Optima Training for Advocates
Length	50 minutes
Module Goals	• Organize the Training Database • Develop a training plan for advocates • Establish a training protocol
Registration	Register Here!

Beyond the Basics (cont.)

Module Title	Tracking Program Trends with Optima
Length	50 minutes
Module Goals	• Understand volunteer recruiting and retention trends • Compare Reports and Data • Use data to “tell a better story”
Registration	Register Here!

Module Title	Troubleshooting Issues and Getting Help in Optima
Length	50 minutes
Module Goals	• Learn to track input errors and omissions • Use reporting to find discrepancies • Create effective Help Tickets for faster assistance
Registration	Register Here!

Module Title	Data Succession and Program Continuity Planning with Optima
Length	50 minutes
Module Goals	• Create a data succession plan • Develop Continuity Handbooks for your positions • Implement a Reporting Plan for fast Quality Assurance
Registration	Register Here!

Module Title	Setting Up and Utilizing Your Optima Training Database
Length	50 minutes
Module Goals	• Understanding the Training Database • Best Practices for using with Initial Advocate Training • Develop a Training Plan
Registration	Register Here!

Module Title	Understanding Critical Data and Reports for New Staff
Length	50 minutes
Module Goals	• A live, and live microphone Q&A session for new staff • Ask questions about process, procedure and reporting • Develop a Reporting and Data Entry Plan
Registration	Register Here!

CONTINUING TRAINING

Optima continues to offer for a fee program-specific, individualized training for new staff or as a refresher for existing staff.

Continuing Training is for any program who wants a more in-depth review, or need to train new program staff in a more in-depth manner. These modules are designed to go over the different steps of Optima processes.

The Continuing Training:

- Is comprehensive of the most common tasks and responsibilities in Optima,
- Program specific information and exercises included in each module,
- Engaging webinar formats with a live instructor,
- Time to review program specific procedures and requirements,
- Includes review of the Program Practices and User Guide Templates.

Continuing Training is designed to be both a training for new staff and a “tune-up”; program staff who just want a quick review, a better understanding or want to check in will benefit greatly from the Continued Training Series.

There are three different services: “Beginning” “Advanced” and “Wellbeing”

Please see the following page for descriptions of each service.

If you would like to book any of the Continuing Training, please contact us by email at Robert@evintosolutions.com or send us a Help Desk Ticket at your convenience to discuss scheduling and pricing for the training(s) of your choice.



Continuing Training Services will build on your success and will help you get the greatest value from Optima. Continuing Training is designed for a program who needs program specific training for new or current staff, with a focus on the unique program needs.

TRAINING, BEGINNING

[Starting from Scratch](#)

The complete Nine Module Training, led by the Optima training staff. Designed to train newly hired staff and supervisors with no experience with Optima. Live webinar trainings, combined with handouts and Optima exercises help new staff to learn Optima.

[New Staff Specialty Training](#)

Since not all new staff need every training module offered in Starting from Scratch, the New Staff Specialty Training allows programs to train the applicable modules: Administrative, Advocate Supervision, or Recruiting and Training. Each is a series of four to five modules focused on just the topic area.

[Refresher Training](#)

For program staff who have Optima training, the Refresher series is designed to review key Optima practices and renew staff's skill level. Additional handouts and new Optima exercises based on the program's practices will be used to deepen staff's Optima knowledge.

TRAINING, ADVANCED

[Advanced Supervision Training](#)

For Paid and Unpaid (peer coordinators, mentors) supervisors, an Optima training course designed on the effective use of Optima for providing excellent support, supervision, management and maintenance of advocates. Live webinar training and discussions will help supervisory staff identify key elements in Optima to use to improve supervision and volunteer experience.

[Advanced Administrative Training](#)

For administrative staff who want to operate Optima in a more effective and impactful manner, an Optima training course designed on the effective use of Optima for improving program performance measures focused on both reporting requirements and volunteer retention.

[Advanced Training for Trainers](#)

For program recruitment, training and development staff, and training designed for using Optima to track recruitment efforts and for implementing Optima training for new advocates, with special attention paid to the Optima Training Database.

WELLBEING

[Wellbeing Set-Up, Table Construction, and Training with Assessment Design](#)

Programs work with an Optima Trainer to design a unique assessment built within Optima. Program staff will learn who to construct the assessment in Optima, build the Look-Up Tables, and learn who to train advocates to complete the assessment.

[Wellbeing Set-Up, Table Construction, and Training](#)

Using an existing assessment, staff are trained to build the tables necessary and learn to train volunteers.