

HOW TO LABEL DOCUMENTS

We would like everyone to use a standard form to label documents before uploading to Optima.

Here is a list of our recommendations. It is basically ##.##.## document name First Initial.Last name

(##.##.## represents Month.Date.Year) You can just use last name, if document for entire family. If multiple children have same initial, please spell out entire first name.

ex: 7.19.18 Court Order M.Smith

Document Type in Optima

Labeling format

Additional/Family Service Provider

##.##.## ProviderName I.Lastname

Agency Status Update

##.##.## Agency Status Update I.Lastname

Aggravated Circumstances Order

##.##.## Agg Circ Order I.Lastname

Attorney Appointment Order/Order of Appearance

##.##.## Atty Appt I.Lastname

Attorney Status Reports

##.##.## Atty Status Rpt I.Lastname

CAPS Notes

##.##.## CAPS Notes I.Lastname

CASA Assignment

##.##.## CASA Assign VolunteerFirst LastName

CASA Court Report-Draft

##.##.## CASA Court Rpt Draft I.Lastname

CASA Court Report-Final

##.##.## CASA Court Rpt I.Lastname

CASA Notes

##.##.## CASA Notes I.Lastname

CASA Pre-Hearing Notes

##.##.## CASA Pre-Hrg Notes I.LastName

CASA Supervisor Hearing Notes

##.##.## CASA Hrg Notes I.Lastname

CASA Order of Appointment

##.##.## CASA Program Appt CaseLastname

CASA Order of Release

##.##.## CASA Order of Release I.Lastname

CASA Status Report-Draft

##.##.## CASA Status Rpt Draft I.Lastname

CASA Status Report-Final

##.##.## CASA Status Rpt I.Lastname

Child Drug & Alcohol Provider Report

##.##.## D&A Rep I.Lastname

Child Drug & Alcohol Screen Log

##.##.## D&A Screen Log I.Lastname

Child Medical Record

##.##.## ProviderName Med Rec I.Lastname

Child Mental Health Provider Report	###.###.### ProviderName MH Rep I.Lastname
Child Police Report/Criminal Record	###.###.### Police Rep/Crim Rec I.Lastname
Child Profile	###.###.### Child Profile I.Lastname
Child Psychological Evaluation	###.###.### ProviderName Psych Eval I.Lastname
Complex Case Review Notes	###.###.### Complex Case Review Notes I.Lastname
Court Order	###.###.### Court Order I.Lastname
Child's Permanency Plan/Family Service Plan	###.###.### CPP or FSP I.Lastname (only need 1)
Dad	###.###.### NameofDocument I.Lastname
Dependency Petition	###.###.### Dep Petition I.Lastname
Educational Information	###.###.### SchoolName DocumentName I.Lastname
Fax/Email	###.###.### Provider Name Fax Email I.Lastname
Finding of Facts	###.###.### Finding of Facts I.LastName
Forensic Interview	###.###.### ProviderName Forensic I.LastName
Foster Parent Reporting Form	###.###.### Foster Parent Rpt I.LastName
Genogram/Diligent Search	###.###.### Genogram/Diligent Search I.Lastname
GPS/CPS Referral	###.###.### GPS/CPS Referral I.LastName
Hearing Notice	###.###.### Hrg Notice I.Lastname
In Home Services Report I.LastName	###.###.### ProviderName In Home Services Rpt
Independent Living Report	###.###.### IL Rpt I.Lastname
Interactional Evaluation	###.###.### ProviderName Interactional I.Lastname
Interstate Compact	###.###.### Interstate Compact I.Lastname
Juvenile Court Summary	###.###.### JCS I.Lastname
Mom	###.###.### NameofDocument I.Lastname
Monthly Exemption Form	###.###.### Monthly Exemption Form I.LastName
Motion	###.###.### Motion (Title) I.LastName
	le. Motion for Respite or Motion Expanded Visitation or Motion to Travel
Parenting Provider Report	###.###.### ProviderName Parenting Rpt I.Lastname
Photograph	###.###.### (Description of) Photo I.LastName
Placement Caregiver Report	###.###.### ProviderName Placement Rpt I.Lastname

Safety Plan	###.### Safety Plan I.LastName
Scheduling Order	###.### Scheduling Order I.LastName
Team Meeting (FGDM, ISPT, PRT, CASSP)	###.### MeetingName I.Lastname
Team Meeting Notice (FGDM, ISPT....)	###.### Type of Meeting Name Notice I.Lastname
TPR Filing	###.### TPR Filing I.LastName
Transition Plan	###.### Transition Plan I.LastName
Visitation Reports/Schedule	###.### ProviderName Visit Rpt I.Lastname