PRETRIAL REALTIME INFORMATION SYSTEM MANAGER (PRISM)

Book I

Version 2.0 User Manual

("PRISM 2.9 .Net Migration" SOW edited version)

1.0 Introduction

1.1 Purpose of this Manual

The purpose of this manual is to provide information to the PRISM user community regarding how to navigate throughout and utilize the functions of PRISM. Specifically, the main objectives of this user manual are:

1. Describe how to add a client in PRISM.
2. Describe how to find a client and client's demographic information in PRISM.
3. Describe how to produce a Pretrial Services Report.
4. Describe how to set up a client's program and activity information and record the supervisory information about a client.
5. Describe how to find information regarding a client's supervision activities and compliance history.
6. Describe the functionality of the drug testing components.
7. Describe how to generate and print reports and forms in PRISM.

1.2 About this Manual

This manual was developed on the assumption that the user would have a basic understanding on how to operate in a Microsoft Windows environment. If the user does not have a basic Microsoft Windows understanding, it is recommended that training in this area occur before the user attempts to use PRISM.

Throughout the manual, the user will see notes as illustrated below:

Note:
These notes are used to explain the functionality of a particular function in greater detail and used to describe how a function might interact with other functions. The notes also provide suggestions to help the PRISM user perform his/her job in a more efficient manner.

1.3 PRISM Overview

PRISM is a web based system and was developed to become the enterprise wide case management tool for the District of Columbia Pretrial Services Agency. The current release of PRISM, PRISM 2.0, which this user manual covers, has now replaced all transactions of ABADABA.

All of ABADABA, whose subsystems are listed below, have been replaced in PRISM 2.0.

1. BACE - Case Entry
   - BANE – Name Inquiry (R/O)
2. BAIR – Initial Release
3. BACR – Court Records
4. BACK – Check Ins for Court, Reporting, PSA, Other and Curfew
5. BASS – Supervision and Support
   - BAPC - Generates Prior Contact Report
   - BARS – Retrieval System
   - BACT – Code Tables
   - BARE – Generates Drug, Curfew and Contact Reports

1.4 Help Desk Information

The user has two options if they ever encounter problems or have questions regarding the system. If it is a question, which requires prompt assistance, the user is advised to call the PSA Help Desk at (202) 585-7930. Questions may also be directed via email to the PSA Help Desk.

2.0 System Login

Purpose: The purpose of the System Login screen is to allow the users to sign on to PRISM using their assigned and valid password.

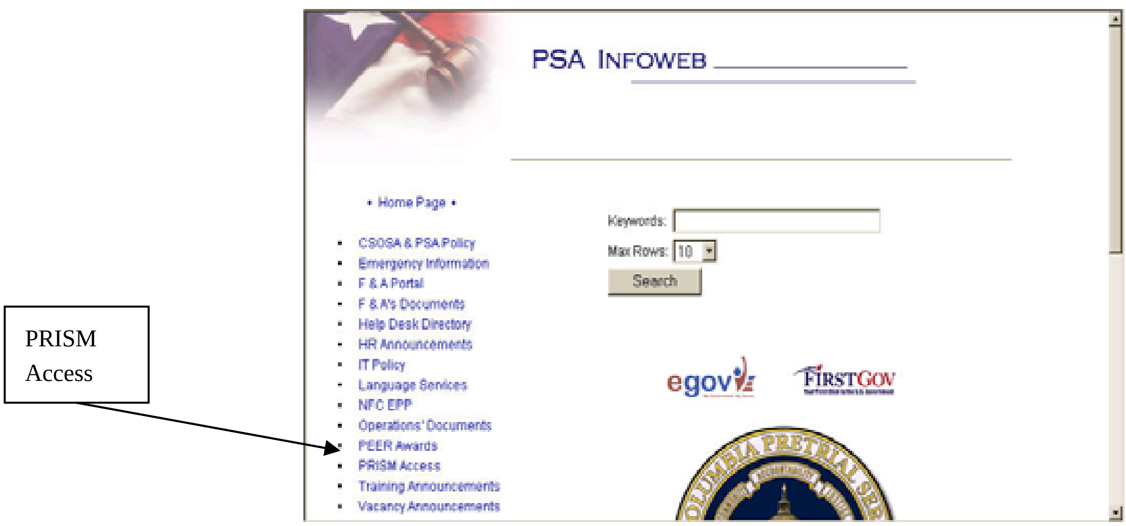
2.1 System Login Procedure:

Logging into PRISM is a two-step process consisting of the following:

Step 1: Launch the PRISM application
Step 2: Log into PRISM

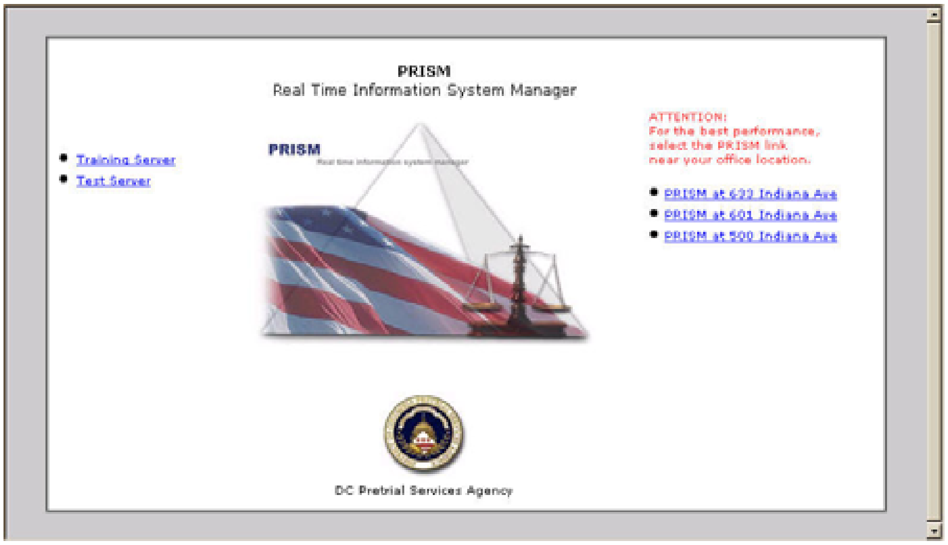
Step 1: Launch the PRISM application

To launch the PRISM application, launch Microsoft Internet Explorer from your desktop computer. If the homepage is set to the PSA Infoweb, the following page will appear as illustrated in the figure below:



Intranet Home Page

On the Infoweb page, click on the PRISM Access link as illustrated in the screenshot above. The following page will appear as illustrated below:



PRISM Application Page

If the screen in the figure above does not appear or the PSA Infoweb is not the homepage, then type the following URL in the address field and press enter:

http://prism/

Click on the appropriate PRISM hyperlink in the screen shown in the figure above and the PRISM Login screen will appear as shown in the figure below:

PRISM Login Screen

<u>Step 2: Log Into PRISM</u>

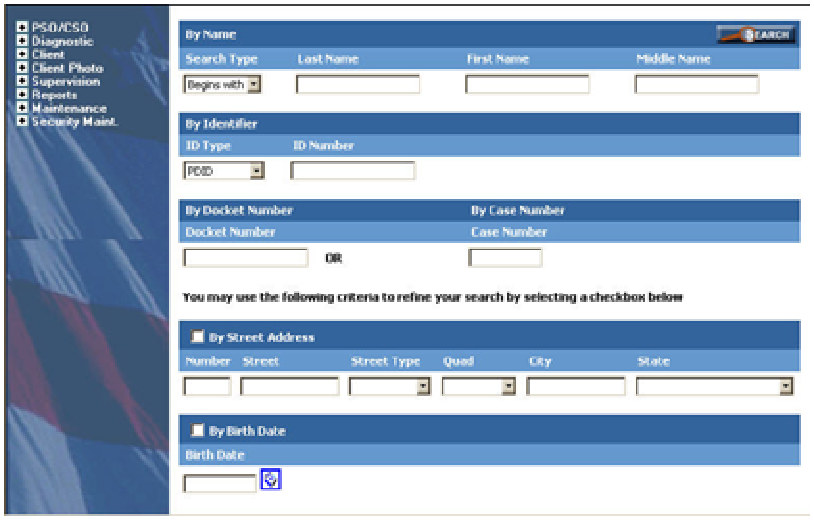
In the User ID field of the login screen as shown in the figure above, enter your User ID. The User ID usually consists of the users last name and first initial (i.e. SmithJ). Users are initially assigned temporary passwords. In the Password field, enter your temporary password. If you have not been assigned or forgotten your User ID and/or Password, please contact the PSA Help Desk at (202) 585-7930.

After successfully logging into PRISM, you will be prompted to reset your individual password. Type in your new password in the New Password field and re-enter the new password in the Confirm New Password field. Note that the password chosen must be at least 8 alphanumeric characters in length. Click on the 

button. The next time you log in, use your User ID and the new password you have chosen.

Note: Access to PRISM is user based. Not every user has access to every menu. A user must contact a supervisor or administration in order to obtain access to a menu they do not have rights to.

The Find Client screen will appear as illustrated in the figure below:

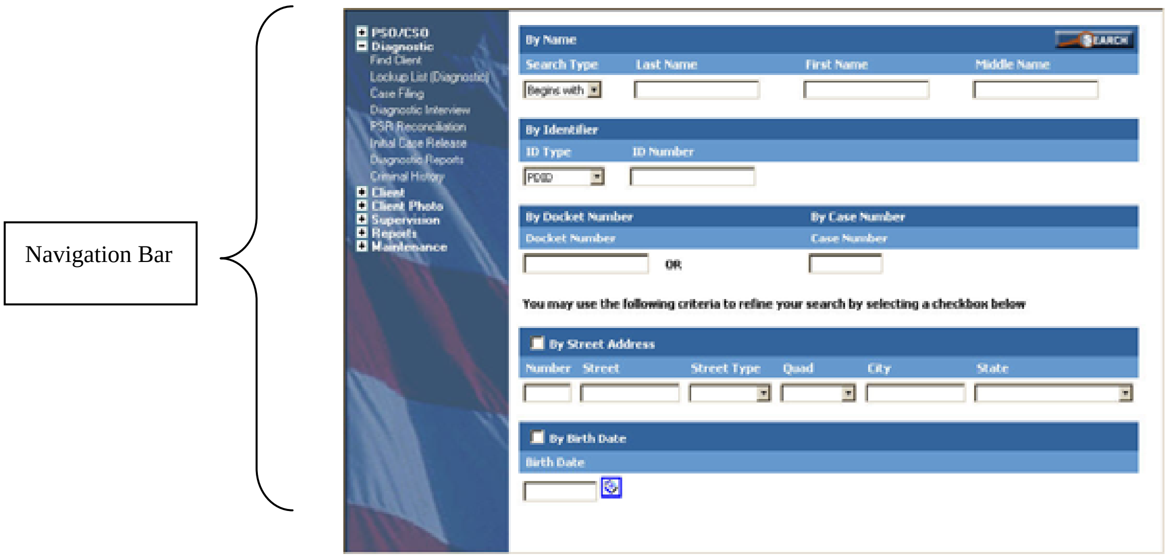


Default Screen

Once logged into PRISM, you will find the navigation menu on the far left and the Find Client screen on the right. For additional information regarding the navigation menu, please see section 3.0 – Navigation Menu.

3.0 Navigation Bar

Purpose: The purpose of the Navigation Bar as illustrated in the figure below, is to provide the user with a menu, which will allow access to all modules of PRISM to which the user has access.



Navigation Menu

Major Functions:

There are eight major menus associated with the navigation bar.

- **PSO/CSO**
- **Diagnostic**
- **Client**
- **Client Photo**
- **Supervision**
- **Reports**
- **Maintenance**
- **Security Maint.**

PSO/CSO – (Based on Supervisory Permissions)

The **PSO/CSO** menu consists of the following modules:

- **My Case Load**
- **My Court Appearances**
- **My Cases Court Appearances**
- **My Task List**
- **Find Client**
- **Lockup List (Drug)**
- **Client Profile**
- **Client Summary**
- **Event Chronology**
- **Match List**
- **Watch List**
- **Reset User Card ID**
- **Change Password**
- **Logoff**

Information regarding the functionality of these modules may be found in Book 1, Section 6.0 – **PSO/CSO** menu.

Diagnostic

The **Diagnostic** menu consists of the following modules:

- **Find Client**
- **Lockup List (Diagnostic)**
- **Case Filing**
- **Diagnostic Interview**
- **PSR Reconciliation**
- **Initial Case Release**
- **Diagnostic Reports**
- **Initial Case Release**

Information regarding the functionality of these modules may be found in Book 1, Section 7.0 – **Diagnostic**.

Client

The **Client** menu consists of the following modules:

- **Find Client**
- **Name**
- **Identifiers**
- **Characteristics**
- **Birth/Death**
- **Citizenship**
- **Languages**
- **Addresses**
- **Communications**
- **Community Ties**
- **Education**
- **Employment**
- **Health**
- **Substance Abuse**
- **Associates**
- **Criminal History**

Information regarding the functionality of these modules may be found in Book 2, Section 1.0 – **Client**.

Client Photo

The **Client Photo** menu consists of the following modules:

- **Client Photo Queue**
- **Client Photo Verifications**
- **Client Photos**

Information regarding the functionality of these modules may be found in Book 2, Section 2.0 – **Client Photo**.

Supervision

The **Supervision** menu consists of the following modules:

- **Release Orders**
- **Programs**
- **Activities**
- **Check-in**
- **Drug Testing**
- **Chain of Custody**
- **Custody Event Logging**
- **Drug Test Photo**
- **Supervision Log**
- **FTA Log**
- **Sanctions and Incentives (New)**
- **Appointments**
- **Sanctions and Incentives**
- **Sessions**
- **Messages**
- **Warrants**
- **Seal/Unseal Information**
- **Curfew Calls Officer**
- **Curfew Evening Unit**
- **Curfew Supervisor**

Information regarding the functionality of these modules may be found in Book 2, Section 3.0 – **Supervision**.

Reports

The **Reports** menu has the following modules:

- **Form Letters**
- **Client Reports**
- **Summary Reports**
- **Diagnostic Reports**

- **Court Letter Tracking**
- **Reports Regeneration**
- **Fix Crystal Viewer**

Information regarding the functionality of these modules may be found in Book 2, Section 4.0 – **Reports**.

<u>Maintenance – (Based on PRISM Administrator Permissions)</u>

The **Maintenance** menu consists of the following modules:

- **Alternate Case Manager**
- **Assign Client Cases**
- **Assign PSO Cases**
- **Associates List**
- **Case Assignment Audit**
- **CIS Interface Administration**
- **Client Consolidation**
- **Comments**
- **Expunge Case**
- **Fmt Rmk Field Def**
- **Lockup Agent**
- **Lookup List**
- **Program Definition**
- **RA Detention Hearing**
- **RA Rcmd Rel Conditions**
- **RA Release Programs**
- **Reassign Cases**
- **Recent Case Assignments**
- **Release Conditions**
- **Release Order Type**
- **Reports Administration**
- **Schedule Agent**
- **SCI Lookup List**
- **Seal Module Definition**
- **Work Request**
- **Workstation Registration**

Information regarding the functionality of these modules may be found in Book 3, Section 1.0 – **Maintenance**.

<u>Security Maintenance (Security Maint) – (Based on Administrator Permissions)</u>

The **Security Maintenance** menu consists of the following modules:

- **Organization**
- **Agency**
- **Unit**
- **Team**
- **User**
- **Menu**
- **Group**
- **Interface**
- **Function**
- **Restriction**

- **Queue**
- **Task**
- **Audit Reports**
- **Set Debug Code**

Information regarding the functionality of these modules may be found in Book 3, Section 2.0 **– Security Maint.**

4.0 Buttons

There are numerous buttons that appear throughout the PRISM application. In order to properly function within the application, the user must know the functionality that these buttons represent.

Add

The Add 

button is used to add a record or additional information to a record.

Delete

The Delete 

button is used to remove a record or information from a record. Once deleted, the information will not be available to the user.

Run Report

The Run Report 

is used to generate a report within the report parameter screen. This button will return the report to the user.

Cancel

The Cancel 

button will clear what the user has just typed prior to saving. If the record has already been saved, the Cancel button will not clear the screen, but will return the user to the previous List screen.

Copy

The Copy 

button is used to copy data from the List view, which has the same type of data to be added. A Form screen will be launched and the contents will be pre-filled with the record selected on the Copy line.

Save

The Save 

button saves the record to the database and usually returns the user to the previous screen (which will generally be the List screen), where the user will see the new record added. In some cases, the screen is refreshed with the newly added information after the Save button is clicked.

Search

The Search button is used when the user is performing a filtered search. To filter a list, the user selects the appropriate filters and clicks on the Search button. A list meeting the criterion (a) entered will be presented.

Find Client

The Find Client button is located in the upper left portion of the header record. This button is used to launch the Find Client screen.

Amend

The Amend button is chosen when a judge or judicial officer issues an amendment to an existing release order.

Remarks

The Remarks button is used to add remarks on any of the forms throughout the system. The remarks must be added on an existing record and must be associated with a specific record. Remarks are internal and not viewed in any external documentation or reports.

Note: There is no function allowing the user to view all remarks. The user must enter each individual screen to view the corresponding remarks.

Verification

The Verification button is used to enter verification information.

Note: If the user returns to the Client Name form after entering into to other modules or tabs, the completed verifications buttons will then appear in red to indicate that an entry has been made in the corresponding verification form. The new verification button will be displayed as illustrated: .

Add Client

The Add Client 

button is used to add a **<u>new</u>** client to the system. In order to add a new client, the user must first search for all known identifiers (PDID, XREF, CSSID, Name, etc.) for the client within the system. If after the search, the client is not located, then the ADD CLIENT button is displayed and can be used.

<u>Calendar</u>

The Calendar  button is located next to all fields that require the user to enter a date. Once the user clicks on the Calendar button, a calendar screen is presented and the date can be entered by clicking on the day, month and year of the desired date.

<u>Messages</u>

The Messages  button appears on the header record for every defendant. If there are undelivered messages associated with the client, the button will be highlighted in yellow .

<u>Judge Selector</u>

The Judge Selector  button is located next to fields, which require the user to enter the name of a judge. Once the Judge Selector button is clicked, a search screen is presented in which the user can search for the assigned judge (using the last name or first letter of last name). The user can then pick the assigned judge from the list by highlighting the name of the judge.

<u>Attorney Selector</u>

The Attorney Selector  button is located next to the Attorney field in the **Release Orders** module. Once the Attorney Selector button is clicked, a search screen is presented in which the user can search for the appointed attorney (using a last name or first letter of last name, using a first name or first letter of first name, or a combination of both. The user can then pick the appointed attorney from the list by highlighting the name of the attorney.

<u>Charge Selector</u>

The Charge Selector  button is located next to the Charge Code field in the Charges and Dispositions sub list of the **Court Cases** module. Once the Charge Selector button is clicked, a search screen is presented in which the user can search for a particular charge (using the code or a description of the charge). The user can then select the charge from the list by highlighting the charge.

<u>Bench Warrant</u>

The Bench Warrant 

button appears on the header record if there has been a bench warrant issued for the defendant. Once the user clicks on the BW button, the **Warrants** module is presented.

<u>Seal Case</u>

The Seal Case 

button appears on the header record if any of the defendant's information has been sealed. Once the user clicks on the SCI button, the Seal Case module is presented.

<u>Filter</u>

The Filter 

button is used to sort or choose data by certain criteria.

5.0 Common Functions

5.1 Copy

The Copy button copies the data from the record selected to a new record onto the associated Form screen. This function would be used if new data to be added was similar in format to an existing record, and only minor over-typing would be needed. To copy the data from the List view, click the button next to the record, which has the same type of data to be added. A Form screen will be presented. The contents will be pre-populated with the record selected on the Copy line. Overtype the field that is different. In order to save this new record, at lease one of the fields from the new copied record must be changed.

5.2 Update/Edit

To update and/or modify an existing record, hyperlink on the record to be updated on the List screen. A Form screen will be presented, with the values of the record to be updated pre-filled. Overtype the appropriate field(s) and save the record. The change(s) will be audited, but the updated record will overlay the record in the List view in most screens. The only exception would be Address, where new records are saved in addition to previously saved records

5.3 Delete

The Delete button will delete the data from the screen. The button is presented on most of the form screens. After clicking the button, the user will be returned to the list screen, where the appropriate record will have been deleted.

5.4 Remarks

Remarks can be added on any of the forms throughout the system, but must be added on an existing record. Remarks must be associated with a specific record (e.g., Education). To add a remark, click on the record you would like to add remarks to from a list. Click on the button on the form and enter the remark on the remarks form. Click to return to the previous form. Click to leave the form, or click again on to see the list of remarks associated with this record, sorted in descending order.

Note: Remarks are internal and for PSA use only. Comments are for external use and will appear on reports.

5.5 Verification

The VERIFICATION button is used to enter verification information. Each entry has one verification record only. A verification record may be updated, and additional information may be appended to existing verification comments. Once verification information has been added, the list will reflect that the entry has been verified. The button can be found on most forms in the system. To add verification information, click on the Verification button on the form and enter the Reference Name (Required), Relationship (required), Verify Date (required), Verify Time, Reference Phone Number, PSA Verifier (required), Verification Result, Verification Method and Verification Comments. Click to return to the previous form. Click to leave the form, or click again on the button to see the verification information with this record. To reflect that verification has been added to a particular form, the verification button will be displayed with the text in the color red as illustrated: .

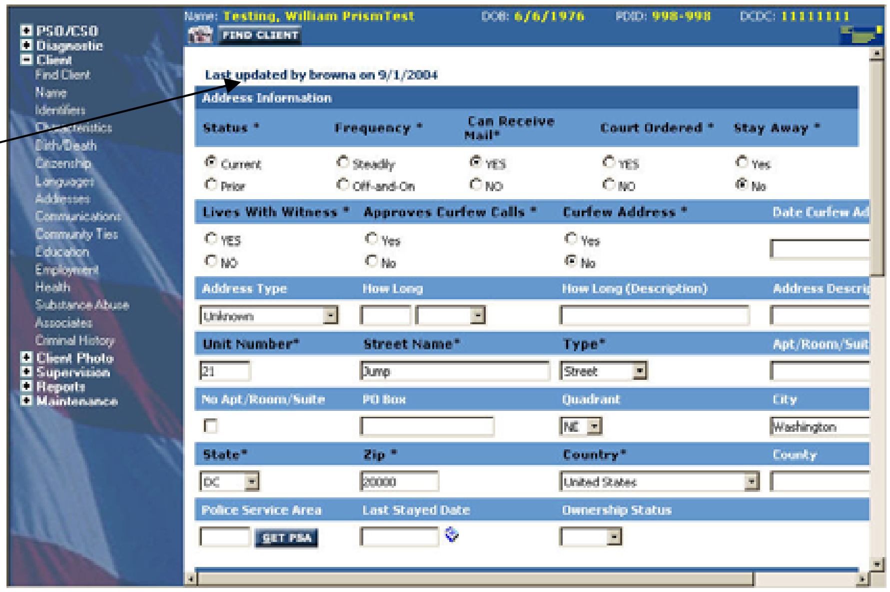
5.6. Business Rules

Many fields in PRISM modules are driven by business rules. Business rules dictate to the user what information is required or not required based upon the type of entry being made. Often, these business rules may prompt the user to add information to fields that were not originally mandatory (denoted by bold face type and have an *). The specific entry may change the required information. As an example, in the Employment module, the Income field is not displayed on the screen as a mandatory field. However, if a user selects ‘Employed’ from the Employment Status dropdown list, users must fill in the Income field.

5.7 Modification Summary

Some modules in PRISM allow a user to view a Modification Summary of data that has been entered/altered. The Modification Summary screen displays a summary of all of the changes and alterations made to the record selected. To view the modification summary for a particular record, a user must be in the form screen for the record and hyperlink on the text that appears at the top of the screen as illustrated below:

Modification Summary hyperlink



Modification Summary hyperlink

After hyperlinking, the Modification Summary screen is displayed as illustrated in the screenshot below:

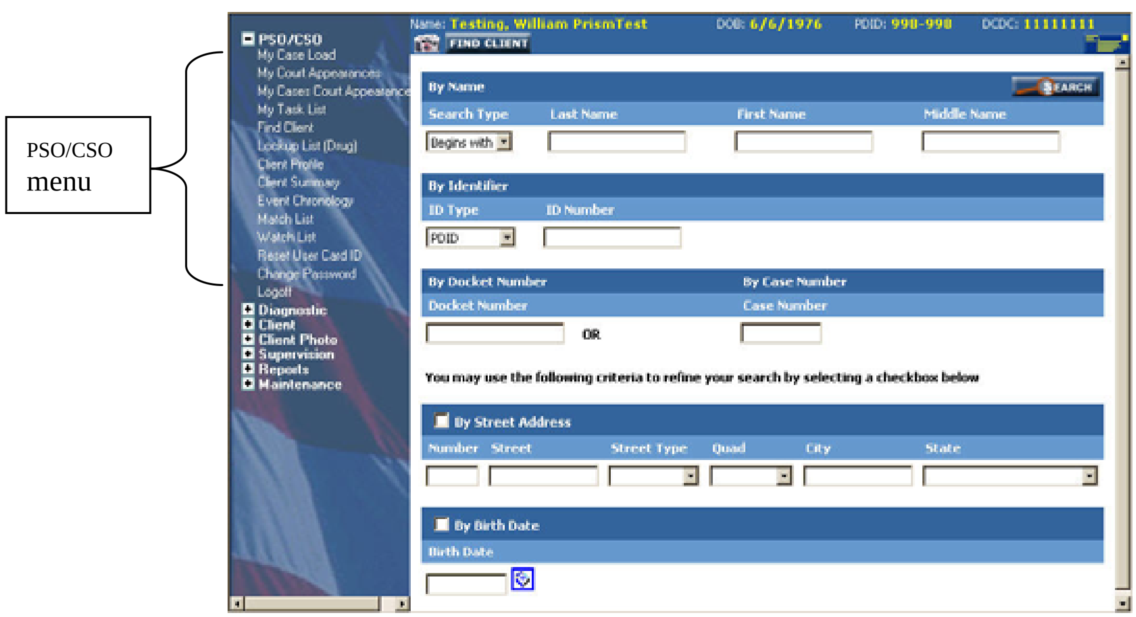
Modification Summary screen

6.0 PSO/CSO

Purpose: The purpose of the **PSO/CSO** menu is to allow the user to view caseload information, view client supervision information, set up match and watch lists, change his or her password, and logoff from the application.

The **PSO/CSO** menu, as illustrated in the figure below, consists of twelve modules

- My Case Load
- My Court Appearances
- My Cases Court Appearances
- My Task List
- Find Client
- Lockup List (Drug)
- Client Profile
- Client Summary
- Event Chronology
- Match List
- Watch List
- Reset User Card ID
- Change Password
- Logoff



PSO/CSO menu

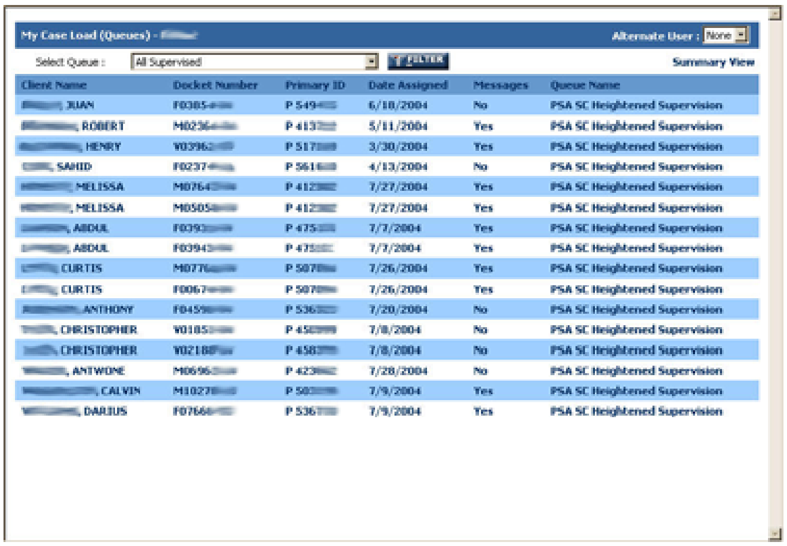
6.1 My Case Load

The **My Case Load** module is located under the **PSO/CSO** menu.

Purpose: This function is used to view a case manager's current and newly assigned caseload.

6.1.1 View and Access Client Records

1. Perform the Find Client function and click on the **My Case Load** module under the **PSO/CSO** menu. The My Case Load list screen is presented as illustrated in the figure below:



My Case Load Screen

Note: A PSO can only view the cases assigned to his/her own user-id. Officers cannot view anyone else's caseload.

2. Hyperlink on the desired client name. The Client ID Profile is presented on the chosen client.
3. Click on My Case Load menu and follow steps 2-3 to view other assigned clients.

Note: The Caseload displayed may be sorted by Client Name, Docket Number, Primary ID (usually the client's PDID number), Date Assigned, Messages, or Queue Name by clicking on the corresponding column heading.

6.2 My Court Appearances

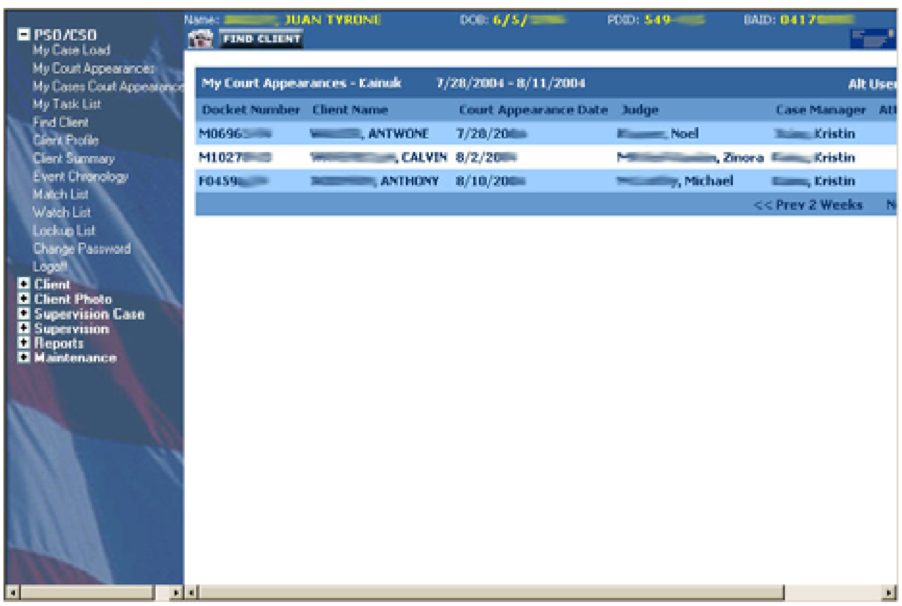
The **My Court Appearances** module is located under the **PSO/CSO** menu.

Purpose: This function is used to view a case manager's upcoming court appearances.

Note: Court representatives in the General Supervision Unit use the **My Court Appearances** module to view their upcoming court appearances and the name of the assigned case manager for their calendar assignment. Court representatives review the My Court Appearances Detail form to determine if agency representation is required at any of the appearances on their calendar assignments.

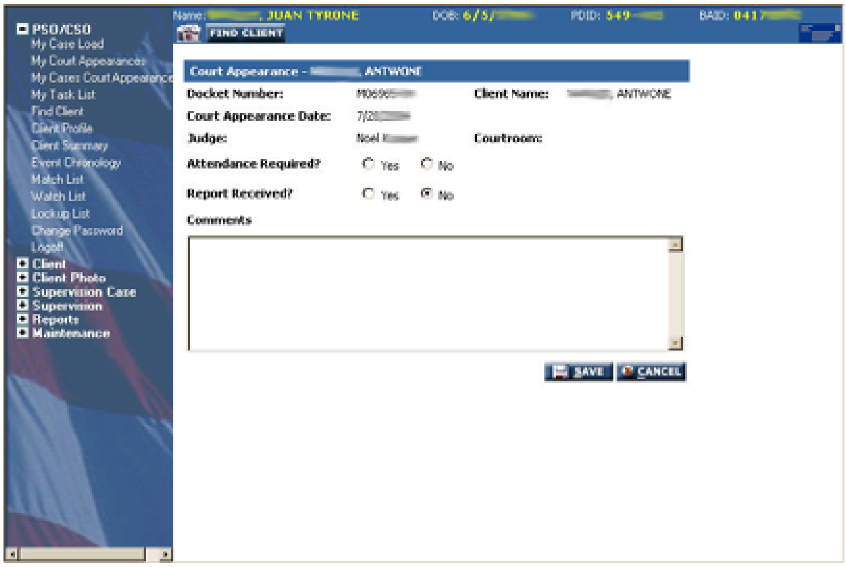
6.2.1 View and Access Upcoming Court Appearances

1. Click on the **My Court Appearances** module under the **PSO/CSO** menu. The My Court Appearances list screen is presented as illustrated below:



My Court Appearances list

2. Hyperlink on the desired client name. The Court Appearance Detail form is presented as illustrated below:



My Court Appearances Detail form

<u>6.3 My Cases Court Appearances</u>

The **My Cases Court Appearances** module is located under the **PSO/CSO** menu.

Purpose: This function is used to view a case manager's upcoming court appearances and the name of the assigned court representative.

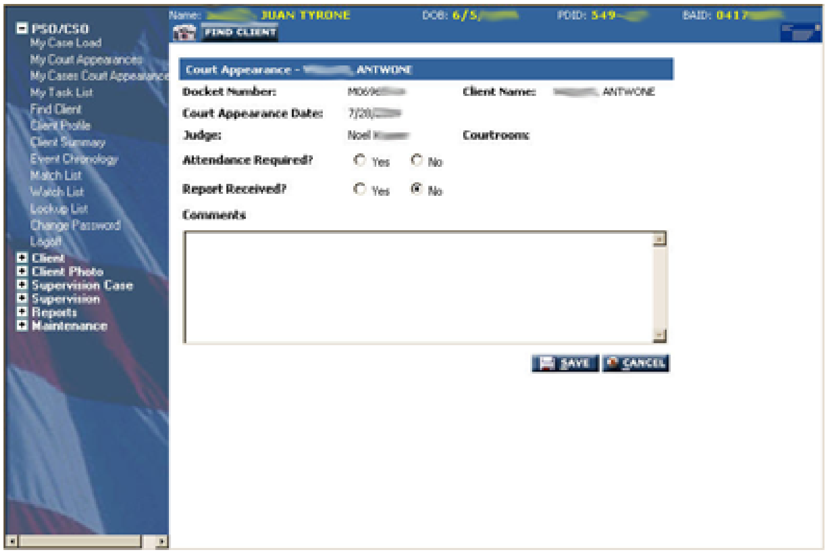
Note: Case managers in the General Supervision Unit use the **My Cases Court Appearance** module to view their clients' upcoming court appearances and to notify court representatives if they need to represent the agency at one of the hearings.

6.3.1 View and Access Upcoming Court Appearances

1. Perform the Find Client function and click on the **My Cases Court Appearances** module under the **PSO/CSO** menu. My Cases Court Appearances list screen is presented as illustrated below:

My Cases Court Appearances list

2. Hyperlink on the desired client. The Court Appearance Detail form is presented as illustrated below:



Court Appearance Detail form

3. Click on the Attendance Required? box to indicate that the case requires a court representative present. Click .

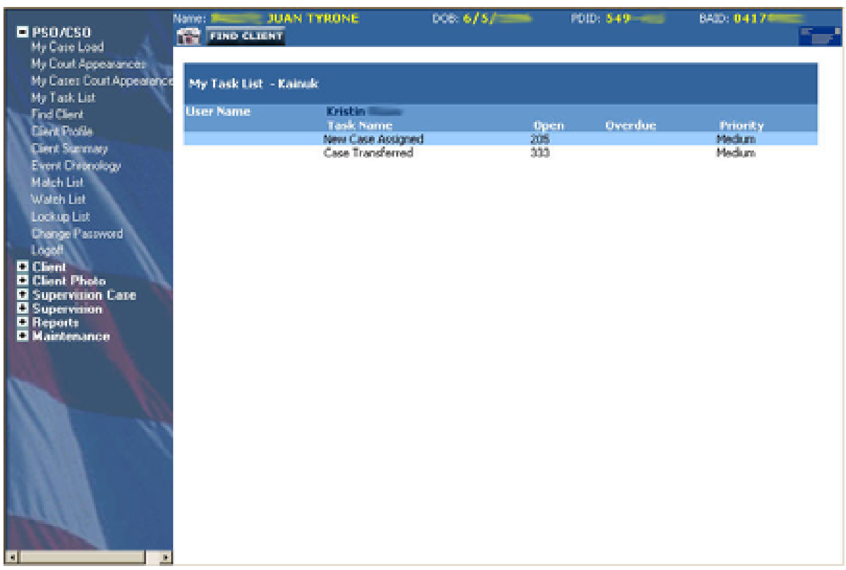
6.4 My Task List

The **My Task List** module is located under the **PSO/CSO** menu.

Purpose: This function is used to view a case manager's incomplete tasks.

6.4.1 View Tasks

1. Perform the Find Client function and click on the **My Task List** module under the **PSO/CSO** menu. The My Task List screen is presented as illustrated below:



My Task List

6.5 Find Client

The **Find Client** module is located under the **PSO/CSO**, **Diagnostic** and **Client** menus.

See Section 7.1 for information on the **Find Client** module.

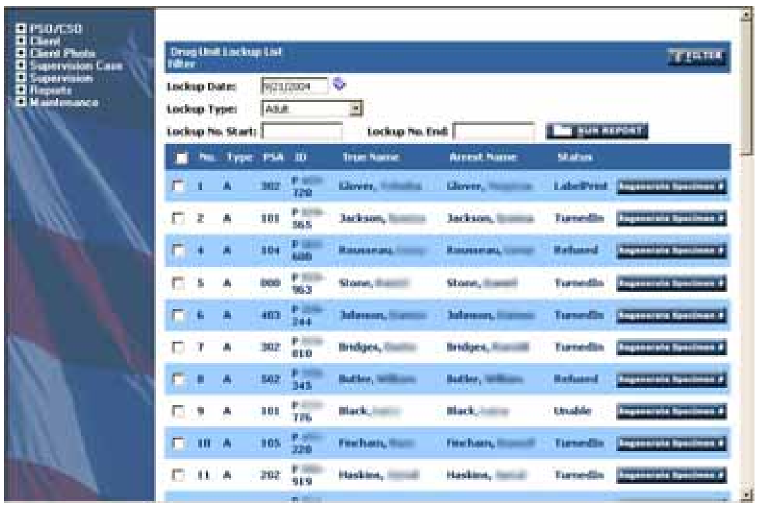
6.6 Lockup List (Drug)

The **Lockup List (Drug)** module is located under the **PSO/CSO** menu.

Purpose: The **Lockup List (Drug)** module contains a record of all of the clients found on a given day's lockup list is used by the DTCU to generate drug testing labels.

6.6.1 View Lockup List and Individual Client Data

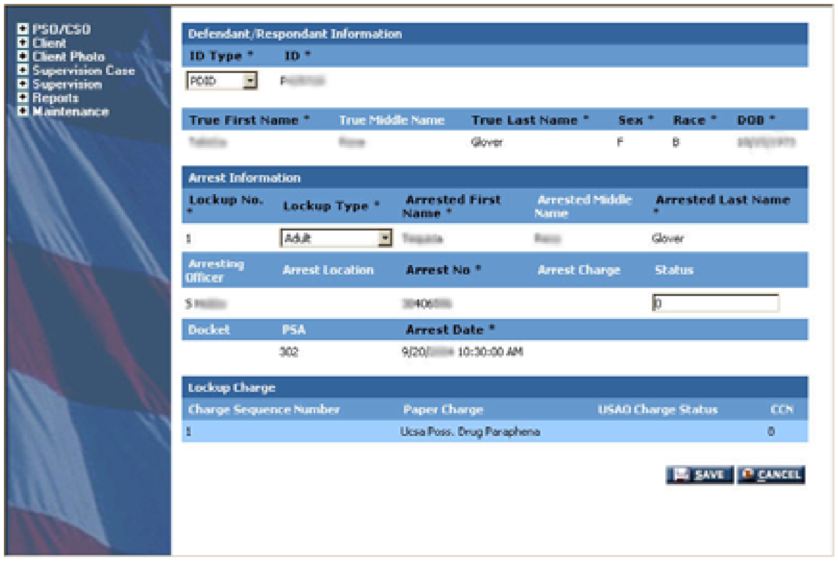
1. Click on the **Lockup List (Drug)** module under the **PSO/CSO** menu. The current day's adult lockup list is displayed as illustrated below:



Lockup List

Note: To view the lockup list information for client's who are on a list other than the adult one, select the type from the Lockup Type dropdown list and click on the  button. Users may also view lockup information from previous days by changing the date in the Lockup Date field.

2. Hyperlink on any of the data displayed for the desired client. The client's arrest information is displayed as illustrated below:



Lockup List – Arrest Information

3. Click CANCEL to return to the list.

6.6.2 Generate Drug Testing Labels

1. Click on the **Lockup List (Drug)** module under the **PSO/CSO** menu. The current day's adult lockup list is displayed as illustrated above.
2. To generate labels for the entire list displayed, click on the checkbox next to the No. field. Otherwise, click on the checkboxes next to the desired clients and click PRINT.

6.6.2.1 Regenerate previously printed labels.

Note: In situations whereby a user needs to print another label for a client who had previously had one printed, these steps should be followed.

1. Click on the **Lockup List (Drug)** module under the **PSO/CSO** menu. The current day's adult lockup list is displayed as illustrated above.
2. Click Regenerate Specimen #. The new drug testing label will be printed.

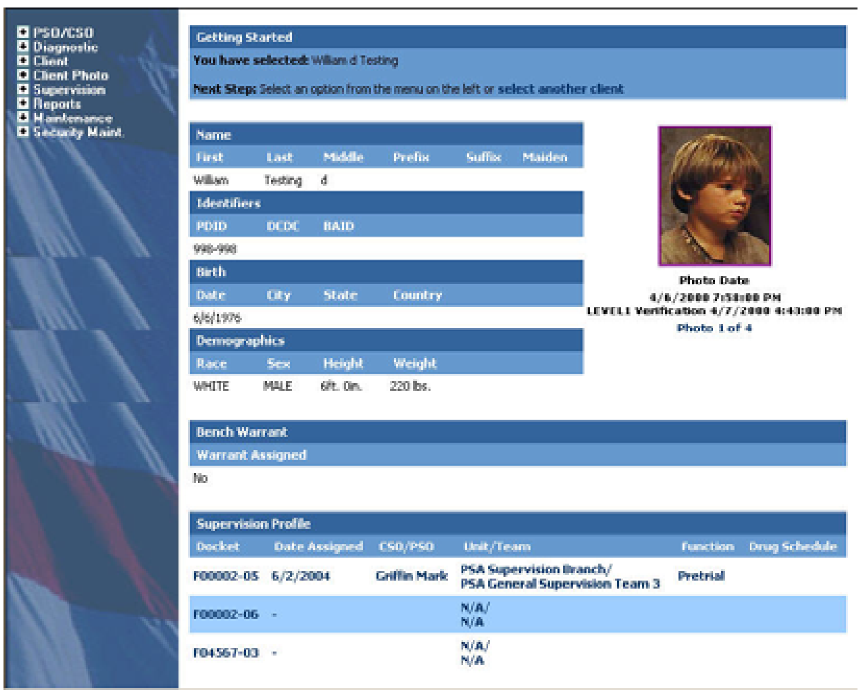
6.7 Client Profile

The **Client Profile** module is located under the **PSO/CSO** menu.

Purpose: The purpose of the Profile screen is to allow the user to view Name, Identifier, Birth, Demographics and Supervision Profile information on the client in one screen. If a photograph of the client is on file, it is displayed in the right hand side of the Client ID Profile screen along with the verification information relating to the photograph.

6.7.1 View and Access Client Profile

1. Perform the Find Client function and then click on the **Client Profile** module under the **PSO/CSO** menu. The Client ID Profile screen is presented as illustrated in the figure below:



Client ID Profile Screen

2. View the desired Photograph, Name, Identifiers, Birth, Demographics, and Supervision Profile information.
3. When thru viewing information, click on desired menu option in the **Client** menu.

6.8 Client Summary

The **Client Summary** module is located under the **PSO/CSO** menu.

Purpose: The Client Summary screen provides consolidated information on the client's demographic information, supervision status, assigned activities, sanctions and incentives, and an event chronology that lists a client's supervision activities such as curfew calls and check-ins. This module is designed to provide an over all picture of the selected client.

6.8.1 View Client Summary Information

1. Perform the Find Client function and click on the **Client Summary** module under the **PSO/CSO** menu. The Client Summary screen is presented as illustrated in the figure below:

Client Summary Screen

2. Use the scroll bar located on the right side of the screen to view the sections of the **Client Summary** screen.

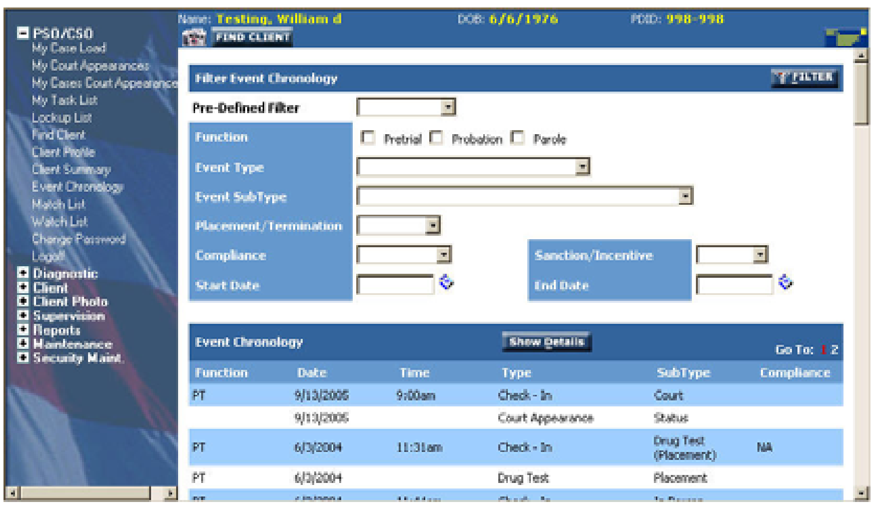
6.9 Event Chronology

The **Event Chronology** module is located under the **PSO/CSO** menu.

Purpose: This function is used to view all of the client's supervision activities. The view may be limited by function (Pretrial, Probation, Parole), by date, compliance level, or activity. This screen is view-only and pulls information from other parts of the system. Data entry on this screen is limited to choosing the type of information the user would like to see.

6.9.1 View Event Chronology

1. Perform the Find Client function and click on the **Event Chronology** module under the **PSO/CSO** menu. The Event Chronology Form is presented as illustrated in the figure below:



Event Chronology Form

Note: The first screen will represent the last 100 records, with no selection criteria applied. If the total is fewer than 100 entries, all of the entries will be displayed. If the total is greater than 100 entries, the most recent 100 activities will be displayed on the 1st page.

2. To further customize the list, select an option from the Pre-Defined Filter (compliant, non-compliant, DCSC View, DTMS F6) dropdown OR select from the following fields:
   - Function (Pretrial, Probation, Parole)
   - Event Type
   - Event Sub-Type

- Placement/Termination
- Compliance
- Start Date
- Sanction/Incentive
- End Date

3. Click on the FILTER button. The Event Chronology screen is refreshed displaying the entries matching the selected criteria.
4. To view the detailed information for each listing, click on the Show Details button.

6.10 Match List

The **Match List** module is located under the **PSO/CSO** menu.

Purpose: The purpose of the Match List is to allow a PSO to review lockup charges and associated details related to an arrest.

6.10.1 View the Match List

1. Perform the Find Client function and click on the **Match List** module under the **PSO/CSO** menu to display the Match List screen as illustrated below:

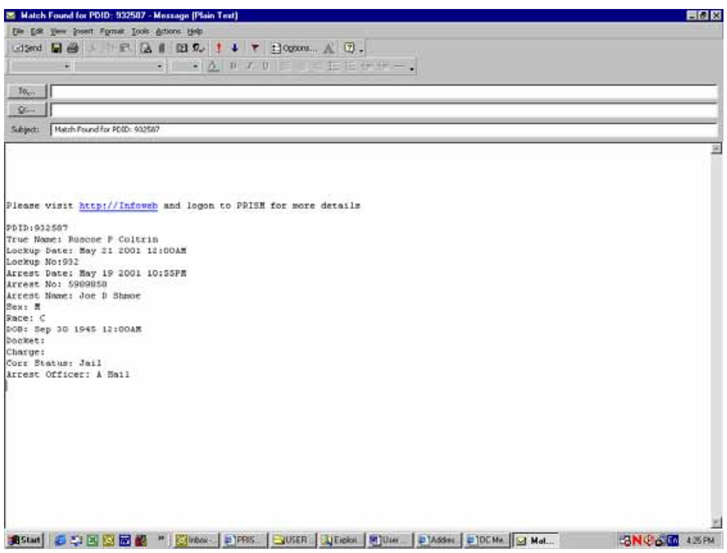
Match List

6.11 Watch List

The **Watch List** module is located under the **PSO/CSO** menu.

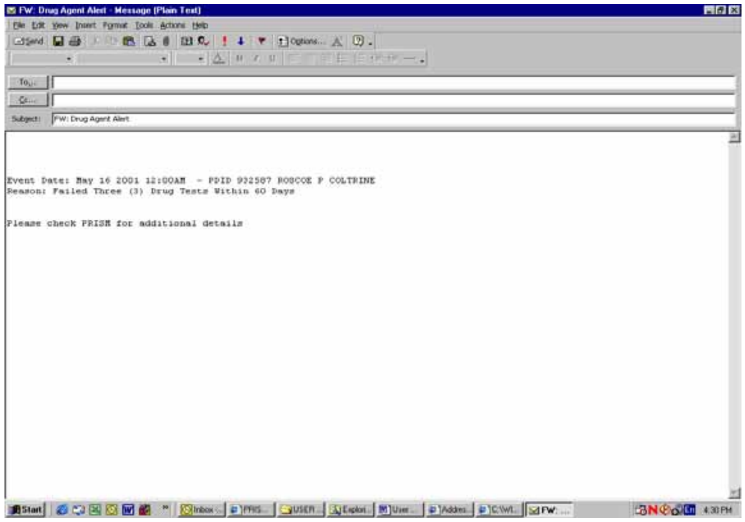
Purpose: The purpose of the Watch List is to allow PSOs to proactively monitor the lockup and drug, curfew, check-in, and session activities of their clients using The Lock Up Agent and The Drug Agent. The Watch List is automatically updated by the system. The user can manually add and delete PDID's to and from the list for both Lock Up and Drug Agents.

The Lock Up Agent: There are times when a defendant under PSA supervision is re-arrested. With the lockup agent, the system automatically generates an email that will notify the supervising PSO of a re-arrest. PRISM searches the lockup list through CJIS every hour and if it finds a match on a Watch List then it generates an email notifying that PSO of the arrest. The email generated is illustrated in the figure below:



Lockup Email Notification

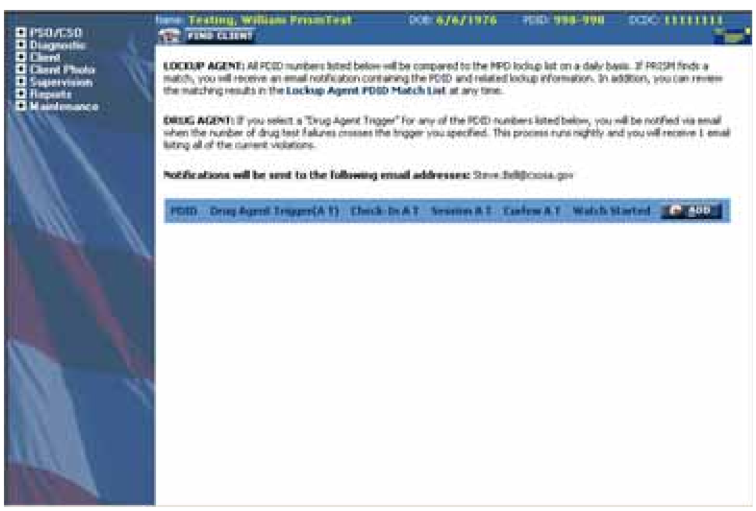
The Drug Agent: Every night the Drug Agent reviews PRISM to find any activity that match PDID numbers a PSO or CSO is supervising. A user can set the drug trigger to notify the PSO every time the client has tested positive or after three positive tests or not set the trigger at all. If a match is found and a Drug Trigger has been set in PRISM, an email will be generated alerting you of a possible Drug Violation. The email generated is illustrated in the figure below:



Drug Agent Alert Email Notification

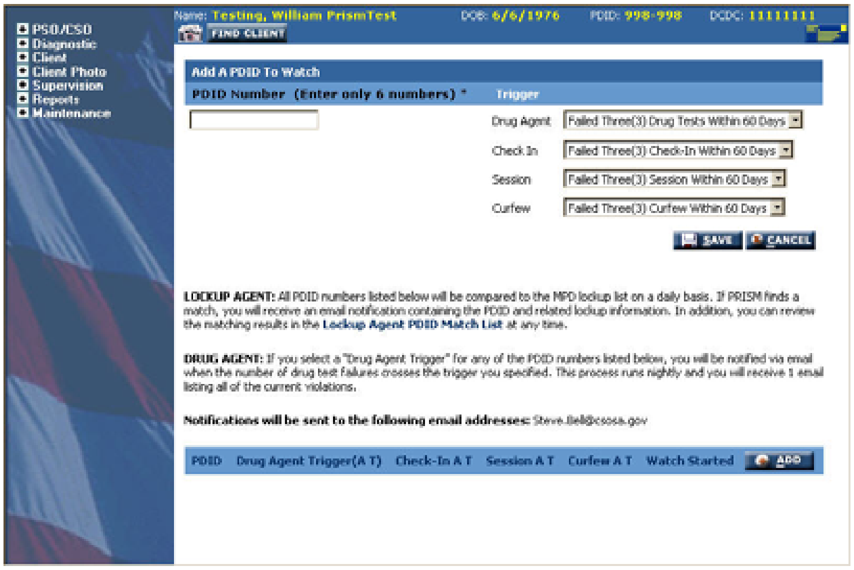
6.11.1 Add to Watch List

1. Click on the **Watch List** module under the **PSO/CSO** menu. The PDID Watch List is presented as illustrated in the figure below:



PDID Watch List

2. Click on the  button. The PDID Watch List form is presented as illustrated in the figure below:



PDID Watch List Form

3. Enter the clients PDID number in the PDID Number field.
4. Choose a trigger from the Drug Agent, Check in, Session, and Curfew Trigger fields (Note: Choose “NONE” if you would only like to receive notifications regarding lock ups).
5. Click 
. You are returned to the Watch List Screen with the newly added PDID number displayed as the first entry on the list.
6. You will now start receiving automatic email notifications on a daily basis if:
   a. Any PDID’s you are supervising are locked up
   b. Any PDID’s you are supervising test positive for drugs by selecting the drug trigger.
   c. Any PDID’s you are supervising fail to check in by selecting the check-in trigger.
   d. Any PDID’s you are supervising fail to attend a session by selecting the session trigger.
   e. Any PDID’s you are supervising violate curfew by selecting the curfew trigger.

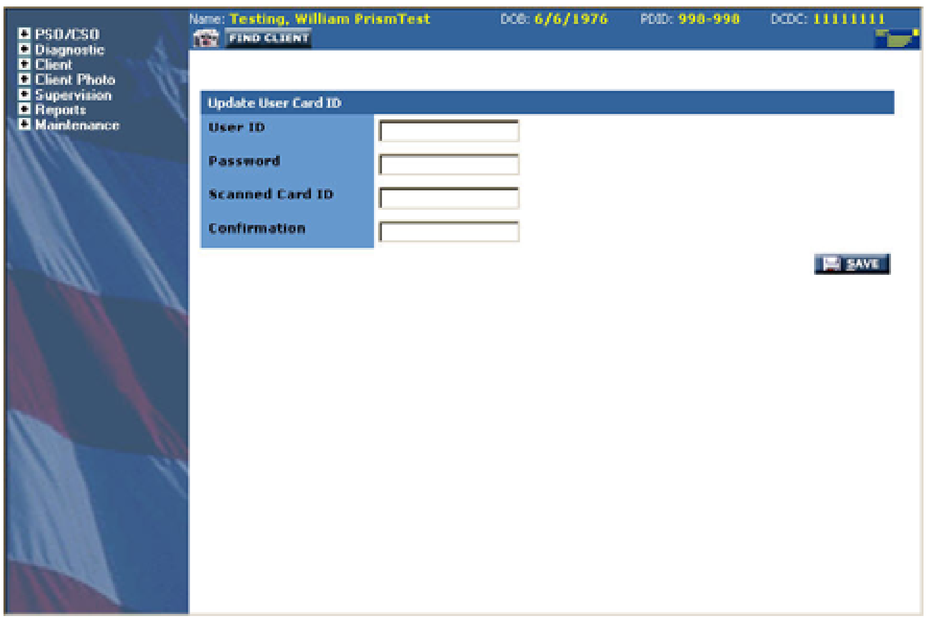
6.12 Reset User Card ID

The **Reset User Card ID** module is located under the **PSO/CSO** menu.

Purpose:

6.12.1 Reset User Card ID

1. Click on the **Reset User Card ID** module under the **PSO/CSO** menu. The Reset User Card ID form is displayed as illustrated below:



Reset User Card ID form

2.

3.

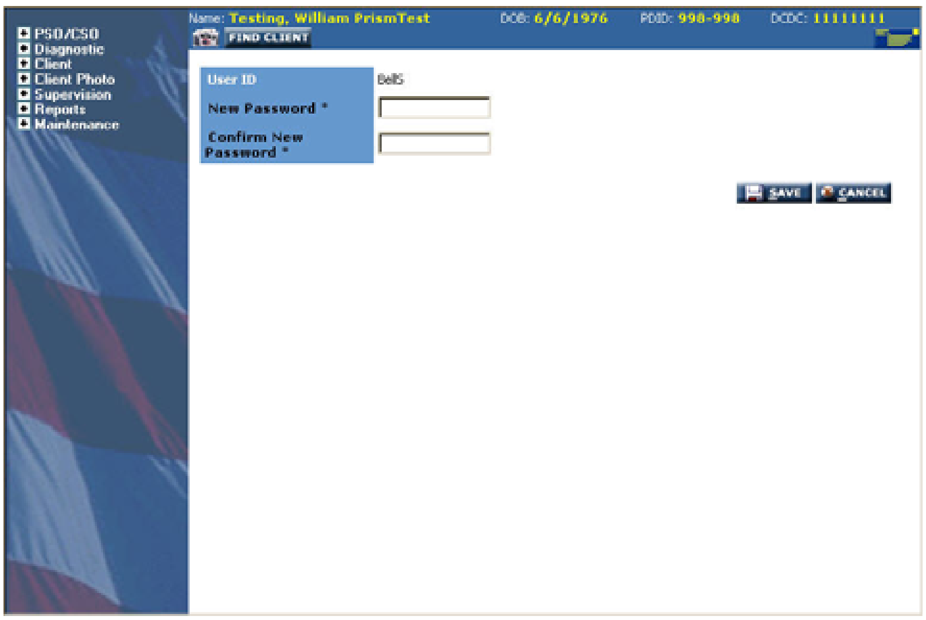
6.13 Change Password

The **Change Password** module is located under the **PSO/CSO** menu.

Purpose: The Change Password screen allows the user to change his/her password.

6.13.1 Change Password

1. Click on the **Change Password** module under the **PSO/CSO** menu. This will present the following screen illustrated in the figure below:



Change Password Screen

Note: Note that fields with **bold face** type fields and an ***** are mandatory fields and must be entered in order to save the information.

2. In the New Password field, enter the password that you want as your **new** password. Passwords must be a minimum of 8 alphanumeric characters.

Note: You cannot cycle a previously used password for six months.

3. In the Confirm New Password field, re-enter your **new** password.

4. Click 

.

Note: By re-entering your new password in step 2 above, the system is validating that the new password has been entered correctly. Once it is saved, the user will be prompted to log into the system using the new password.

6.14 Logoff

The **Logoff** module is located under the **PSO/CSO** menu.

Purpose: The purpose of the Logoff screen is to allow the user to logoff from PRISM and is the preferred method of logging off.

To logoff from PRISM, perform the following:

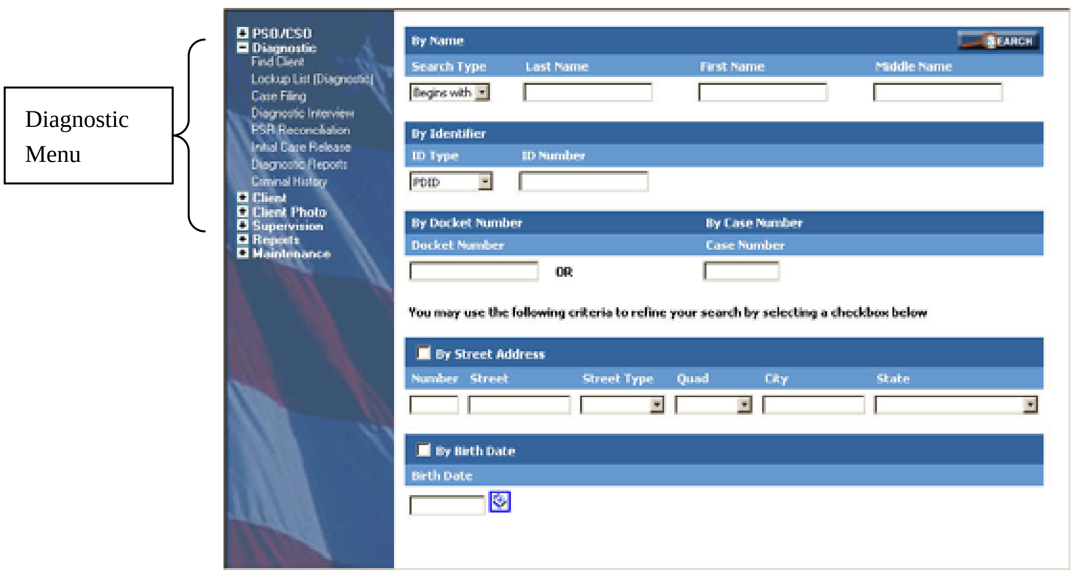
1. Click on the **Logoff** module.

The system will return you to the Login screen.

7.0 Diagnostic

Purpose: The **Diagnostic** menu is used to perform all of the functions related to the diagnostic process. The options allow users to locate and add clients into PRISM, enter case filing and interview information, produce a risk assessment and release recommendation for a client, print reports related to the diagnostic process, track and generate court notification letters, and to perform the PRISM functions related to a client's initial release from court. As illustrated in the figure below, the **Diagnostic** menu contains the following modules:

- Find Client
- Lockup List (Diagnostic)
- Case Filing
- Diagnostic Interview
- PSR Reconciliation
- Initial Case Release
- Diagnostic Reports
- Criminal History



Diagnostic menu

7.1 Find Client

The **Find Client** module is located under the **PSO/CSO, Diagnostic,** and **Client** menus.

Purpose: The purpose of the Find Client screen is to allow the user to locate a particular client within PRISM.

Note: The Find Client screen, shown in the figure above, is the default screen presented to the user upon successfully logging into the application.

7.1.1 Find Client

There are six methods by which to find a client:

1. By Name
2. By Identifier
3. By Docket Number
4. By Case Number
5. By Street Address
6. By Birth Date

7.1.1.1 Find Client By Name

Note: If the Find Client screen is not already selected, then click once on the **Find Client** module under the **PSO/CSO, Diagnostic,** or **Client** menus.

1. Select the Search type using the Search type drop down menu. This menu provides the user with the following search type options:
   a. Begins with
   b. Exact
   c. Sounds Like

Note: "Begins with" is the default value that initially populates the Search Type field.

2. Type the Client's last name in the Last Name field and/or first name in the First Name field. If Search Type = Begins With, then only the first few letters of the Client's Last

Name are required. If Search Type = Exact, then the Client's entire last name must be entered. At this time, the "Sounds like" function is not operable.

3. Click .

Note: The user may further narrow his/her search by utilizing the By Street Address and/or By Birth Date options. To utilize one or both of these options, review sections 7.1.1.5 and 7.1.1.6 explained later in this section.

4. The application will return all records that meet the specified search criteria as illustrated below:

Find Client Search Results

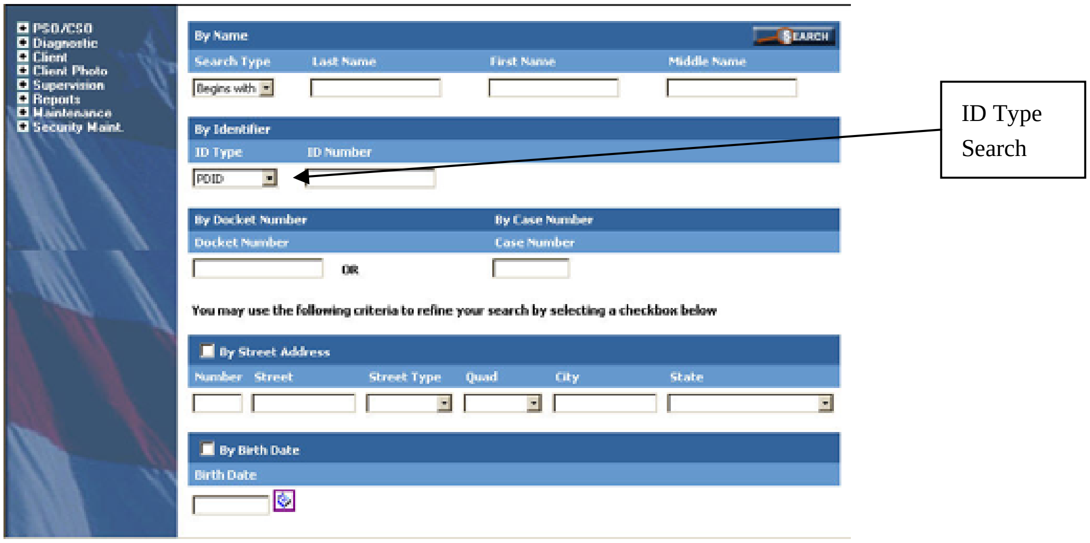
5. To select a client, hyperlink on any piece of the client's information. If the desired client is not on the list, then return to the find client screen by clicking on the **Find Client** module under the **Client** menu and try searching using different criteria.

Note: Users should exhaust all available methods of searching for a client in PRISM. If it is determined that a client needs to be added, click on the  button and follow the Add Client procedures explained later in this section.

7.1.1.2 Find Client By Identifier

Note: If the Find Client screen is not already selected, then click once on the **Find Client** module under the **PSO/CSO, Diagnostic,** or **Client** menus.

1. Select the type of ID from the ID Type dropdown menu as illustrated below:



Find Client screen

2. Enter the number in the ID Number field.
3. Click .
4. The application will return all records that meet the specified search criteria as illustrated in the figure below:

Find Client Search Results

5. To select a client, hyperlink on any piece of the client's information. If the desired client is not on the list, then return to the find client screen by clicking on one of the **Find Client** modules and try searching using different criteria.

Note: Users should exhaust all available methods of searching for a client in PRISM. If it is determined that a client needs to be added, click on the  button and follow the Add Client procedures explained later in this section.

7.1.1.3 Find Client By Docket Number

Note: If the Find Client screen is not already selected, then click once on the **Find Client** module under the **PSO/CSO, Diagnostic,** or **Client** menus.

1. Type the docket number in the Docket Number field.

Note: The value entered into the Docket Number field must be in the proper format. (Ex: F12345-04)

2. Click .
3. The application will return all records that match the specified criteria as illustrated previously.
4. To select a client, hyperlink on any piece of the client's information. If the desired client is not on the list, then return to the find client screen by clicking on the Find Client menu under the Client module and try searching using different criteria.

Note: Users should exhaust all available methods of searching for a client in PRISM. If it is determined that a client needs to be added, click on the  button and follow the Add Client procedures explained later in this section.

7.1.1.4 Find Client By Case Number

Note: If the Find Client screen is not already selected, then click once on the **Find Client** module under the **PSO/CSO, Diagnostic,** or **Client** menus.

1. Type the case number in the Case Number field.

Note: The value entered into the Case Number field must be eight digits in length.

2. Click .

3. The application will return all records that match the specified criteria
4. To select a client, hyperlink on any piece of the client's information. If the desired client is not on the list, then return to the find client screen by clicking on the **Find Client** module under the **Client** menu and try searching using different criteria.

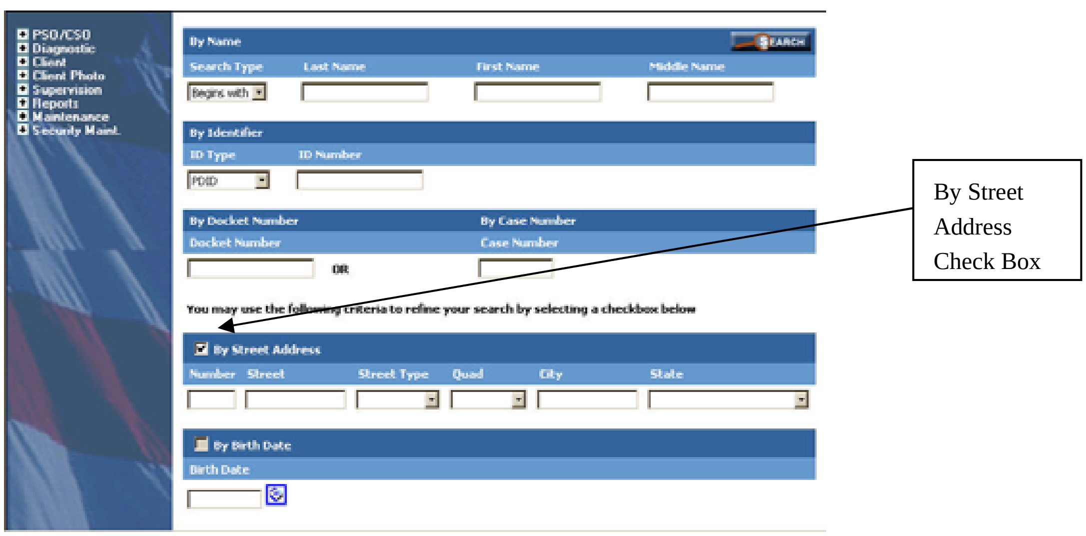
Note: Users should exhaust all available methods of searching for a client in PRISM. If it is determined that a client needs to be added, click on the 

button and follow the Add Client procedures explained later in this section.

7.1.1.5 Find Client By Street Address

Note: If the Find Client screen is not already selected, then click once on the **Find Client** module under the **PSO/CSO, Diagnostic,** or **Client** menus.

1. Check the By Street Address check box in the **Find Client** module as illustrated in the figure below:



Find Client

2. Enter the appropriate address information in the designated fields. Although users may complete as many or as few fields as desired, the fewer number of fields completed will result in a less precise search.
3. Click on the 

button.
4. The application will return all records that meet the specified search criteria as illustrated previously.

5. To select a client, click on any piece of the client's information. If the desired client is not on the list, then return to the Find Client screen by clicking on the **Find Client** module under the **Client** menu and try searching using different criteria.

Note: Users should exhaust all available methods of searching for a client in PRISM. If it is determined that a client needs to be added, click on the 

button and follow the Add Client procedures explained later in this section.

7.1.1.6 Find Client By Birth Date

Note: If the find client screen is not already selected, then click once on the **Find Client** module under the **PSO/CSO, Diagnostic,** or **Client** menu.

1. Check the By Birth Date check box in the **Find Client** module as illustrated in the figure below:

Find Client Screen

2. Enter the client's date of birth in the Birth Date field. Although users may complete as many or as few fields as desired, the fewer number of fields completed will result in a less precise search.

Note: The date of birth entered must be in the proper format of MM/DD/YYYY.

3. Click 

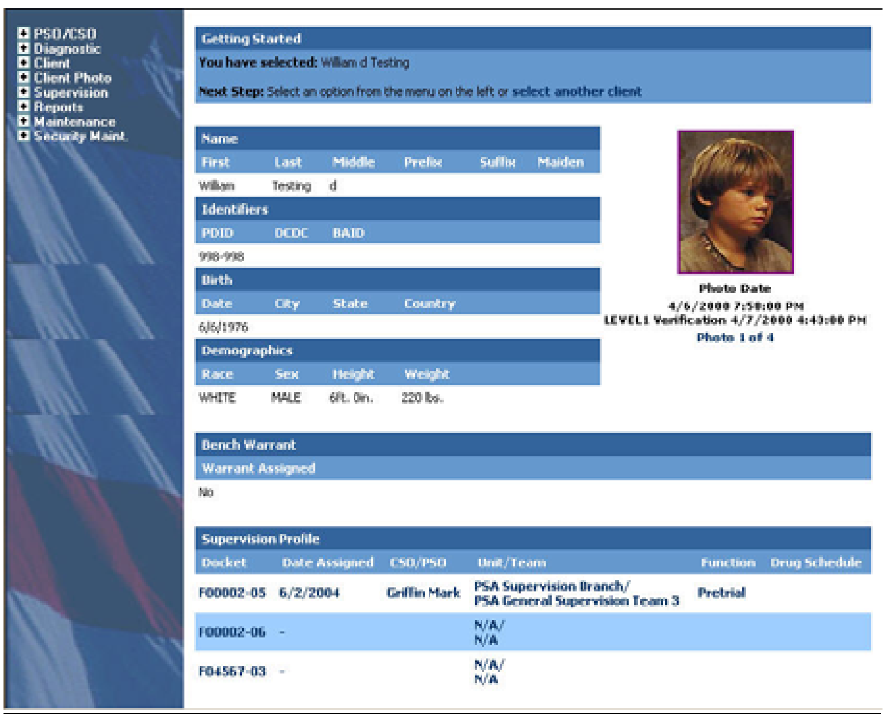
.

4. The application will return all records that meet the specified search criteria as illustrated previously.
5. To select a client, click on any piece of the client's information. If the desired client is not on the list, then return to the find client screen by clicking on the **Find Client** module under the **Client** menu and try searching using different criteria.

Note: Users should exhaust all available methods of searching for a client in PRISM. If it is determined that a client needs to be added, click on the 

button and follow the Add Client procedures explained later in this section.

After hyperlinking on any piece of the client information in Step 4, the Client ID Profile screen will be presented displaying snapshots of the client's demographic data as illustrated in the figure below. The data presented will help the user ascertain if this is the correct client they wish to work with. This screen also presents the client's Supervision Profile displaying information such as Date Assigned, Function, and PSO supervising the client, Unit, Team and Docket Number.



Client ID Profile Screen

When this screen appears, the user is now ready to perform additional functions regarding the client selected.

7.1.2 Add a Client

Note: If the client search does not return the client the user was trying to locate, then the user may choose to add a client.

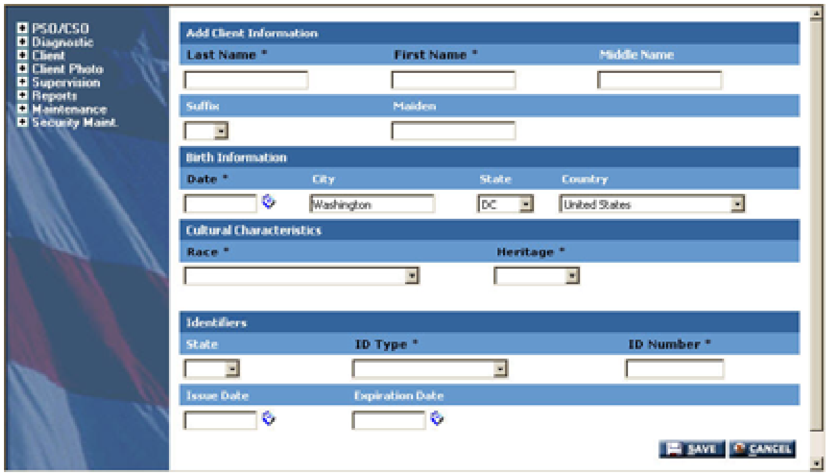
1. After performing an unsuccessful client search, click on the 

button shown in the illustration below:

Find Client Search Results

2. After clicking on the 

button, the Client Name form is displayed as illustrated below:



Client Name Form

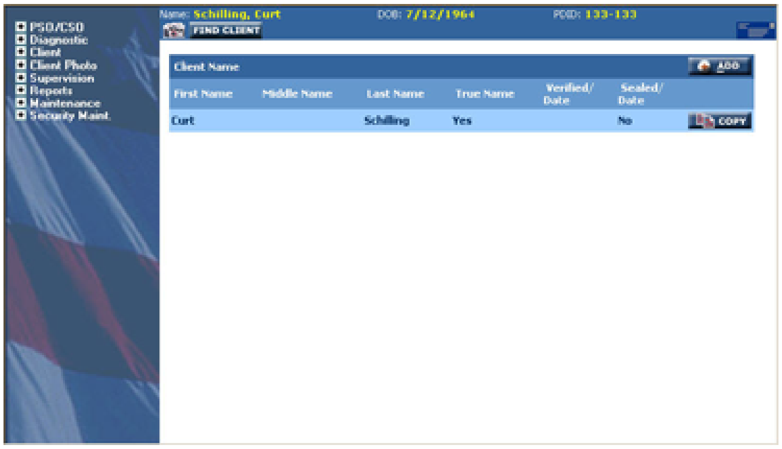
Note: Note that fields with **bold face** type fields and an ***** are mandatory fields and must be entered in order to save the information.

3. Record the client's name in the fields provided.
4. Record the client's date of birth in the Date field.
5. In the fields provided, record the client's city, state, and country of birth. These fields default to Washington, DC, United States.
6. Select the race of the client from the Race dropdown list.
7. Select the client's heritage from the Heritage dropdown list.
8. Select an ID Type (most frequently a PDID number) from the dropdown list provided.
9. Record the client's ID number in the field provided.

Note: If the ID number recorded in the ID Number field matches that of another client, PRISM will not permit the user to save the information.

10. Click 

. The user is returned to the Client Name list screen where the data just entered is displayed as illustrated below:



Client Name list

7.2 Lockup List (Diagnostic)

The **Lockup List (Diagnostic)** module is located under the **Diagnostic** menu.

Purpose: The purpose for this module is to view lockup information of clients on a specific lockup date. Users also may use this module to print prior contact reports.

7.2.1 View Diagnostic Unit Lockup List

1. Click on the **Lockup List (Diagnostic)** module under the **Diagnostic** menu. The current day's lockup list is displayed as illustrated below:

Note: The information displayed defaults to the current day's *adult* lockup list.

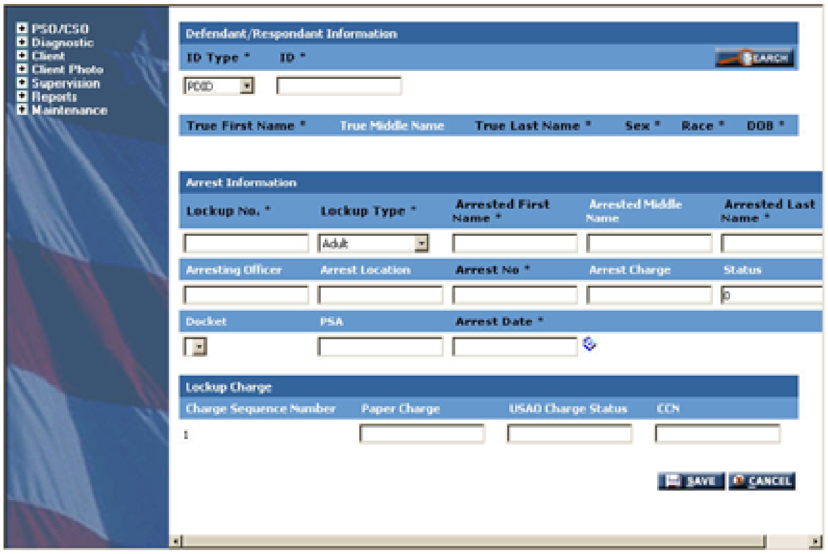
2. To view another day's lockup list and/or a list other than the adult list, change the Start Date, End Date, and Lockup Date fields as needed and click on the  button. The new list is displayed.

7.2.2 View Diagnostic Unit Lockup List Arrest Details

1. Click on the **Lockup List (Diagnostic)** module under the **Diagnostic** menu. The current day's lockup list is displayed as illustrated previously.
2. Hyperlink on the desired defendant. The defendant/respondent arrest information is displayed as illustrated below:

7.2.3 Add a new defendant to the Diagnostic Unit Lockup List

1. Click on the **Lockup List (Diagnostic)** module under the **Diagnostic** menu. The current day's lockup list is displayed as illustrated previously.
2. Click on the  button at the bottom of the screen. The Defendant/Respondent Information form is displayed as illustrated below:



Defendant/Respondent Information form

3. Find the desired client by typing in the client's PDID or Temporary ID number and clicking on the  button. PRISM will populate the True First Name, True Middle Name, True Last Name, Sex, Race, DOB, Arrest First Name, Arrest Middle Name, and Arrest Last Name with the client's information. Fill in the remaining fields with the client's arrest information.

Note: Users may change the Arrest First, Middle, and Last Name fields as needed.

4. Click on the  button. The user is returned to the list screen and the client added is displayed.

7.2.4 Print Prior Contact Reports

1. Click on the **Lockup List (Diagnostic)** module under the **Diagnostic** menu. The current day's lockup list is displayed as illustrated previously.
2. Click on the checkbox for the desired clients and click on the  button at the bottom of the screen. The selected Prior Contact Reports will print on the default printer for the pc used.

Note: To select all of the clients on the list for printing, click on the checkbox located next to the Type column header as displayed in the screenshot below:

7.3 Case Filing

[Intentionally Removed – 04/22/2009dkc]

7.4 Diagnostic Interview

[Intentionally Removed – 04/22/2009dkc]

7.5 PSR Reconciliation

[Intentionally Removed – 04/22/2009dkc]

7.5 Diagnostic Reports

The **Diagnostic Reports** module is located under the **Diagnostic** and **Reports** menus.

Purpose: The purpose of the **Diagnostic Reports** module is to allow the user to run different reports that relate to the Diagnostic process. The four report types that can be generated through the **Diagnostic Reports** module are Arrest History, Criminal History, Pretrial Services Report (PSR), and Prior Contacts.

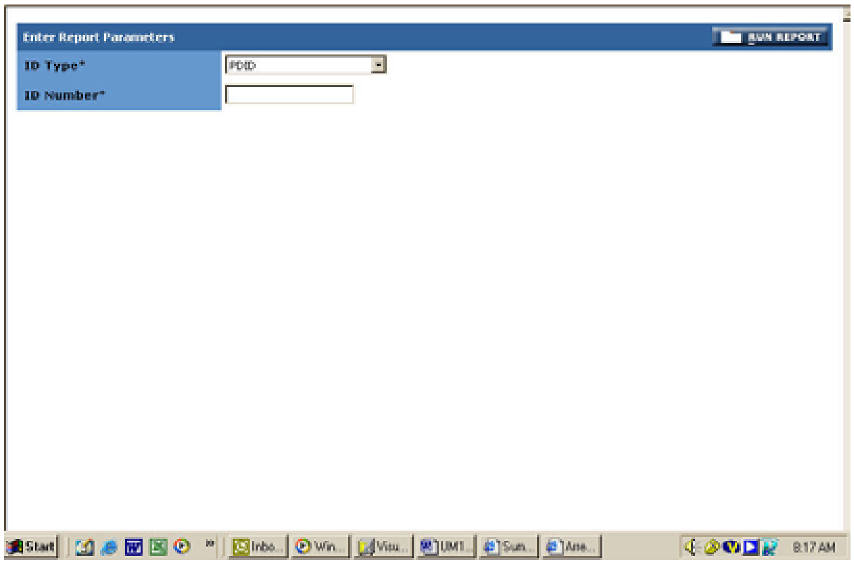
7.5.1 Generate an Arrest History Report

Purpose: This report provides the entire arrest history for the client selected.

1. Click on the **Diagnostic Reports** module under the **Diagnostic** menu. The summary reports list screen is displayed as illustrated below:

Summary Reports list

2. Click on Arrest History. A new window will open with the Arrest History Report form displayed as illustrated below:



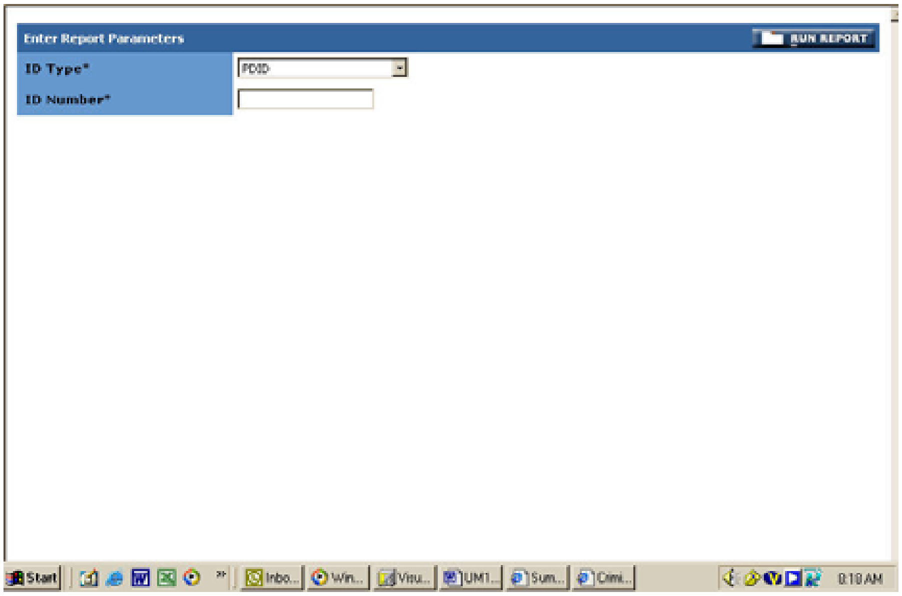
Arrest History Report form

3. Select the type of ID from the ID Type dropdown list.
4. Record the client's ID Number and click .
5. A Crystal Reports ActiveX Viewer is presented with a preview of the report displayed.
6. Click on . The Arrest History Report will be generated.

7.5.2 Generate a Criminal History Report

Purpose: This report provides the entire conviction history for the client selected.

1 Click on the **Diagnostic Reports** module under the **Diagnostic** menu. The summary reports list screen is displayed as illustrated above.
2 Click on Arrest History. A new window will open with the Criminal History Report form displayed as illustrated below:



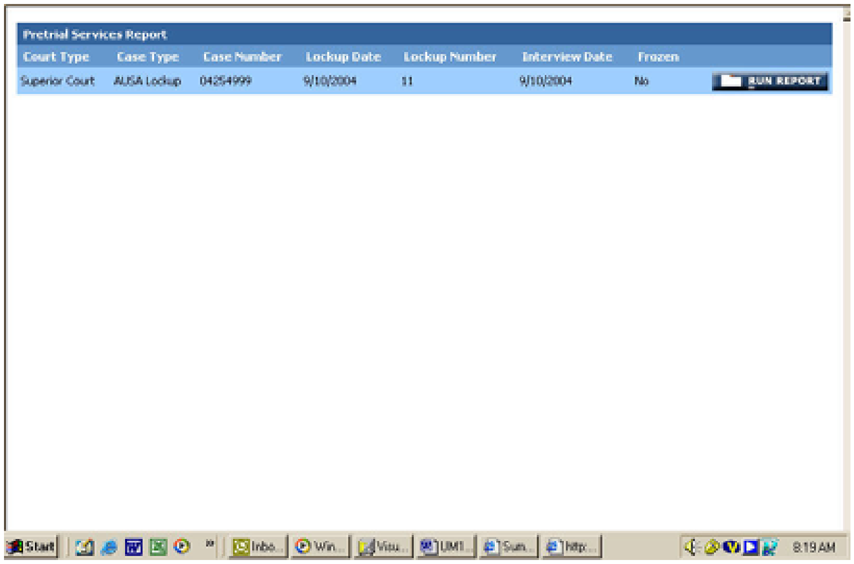
Criminal History Report form

3 Select the type of ID from the ID Type dropdown list.
4 Record the client's ID Number and click RUN REPORT.
5 A Crystal Reports ActiveX Viewer is presented with a preview of the report displayed.
6 Click on . The Criminal History Report will be generated.

7.5.3 Generate a Pretrial Services Report (PSR)

Purpose: The Pretrial Services Report is the report that is submitted to the Court for use in determining a client's bail status. The report contains the client's demographic and criminal history information and includes a release recommendation from PSA.

1. Perform the Find Client function and click on the **Diagnostic Reports** module under the **Diagnostic** menu. The summary reports list screen is displayed as illustrated above.
2. Click on Pretrial Services Report. A list of all of the client's pretrial services reports is displayed as illustrated below:



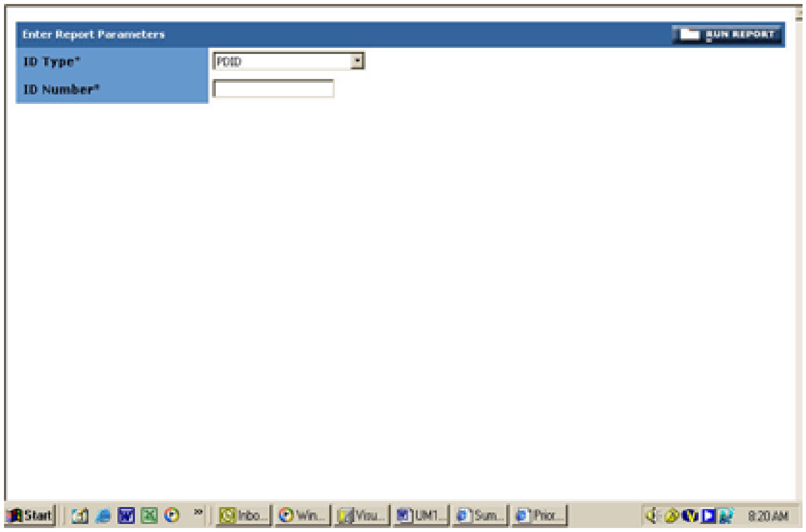
Pretrial Services Report form

3. Click  for the desired case.
4. A Crystal Reports ActiveX Viewer is presented with a preview of the report displayed.
5. Click on . The Pretrial Services Report will be generated.

7.5.4 Generate a Prior Contacts Report

Purpose: The Prior Contacts Report contains a summary of the client's demographic and criminal history information.

1. Click on the **Diagnostic Reports** module under the **Diagnostic** menu. The summary reports list screen is displayed as illustrated above.
2. Click on Prior Contacts. A new window will open with the Prior Contacts Report form displayed as illustrated below:



Prior Contacts Report form

3. Select the type of ID from the ID Type dropdown list.
4. Record the client's ID Number and click .
5. A Crystal Reports ActiveX Viewer is presented with a preview of the report displayed.
6. Click on . The Prior Contacts Report will be generated.

7.6 Court Letter Tracking

The **Court Letter Tracking** module is located under the **Diagnostic** menu.

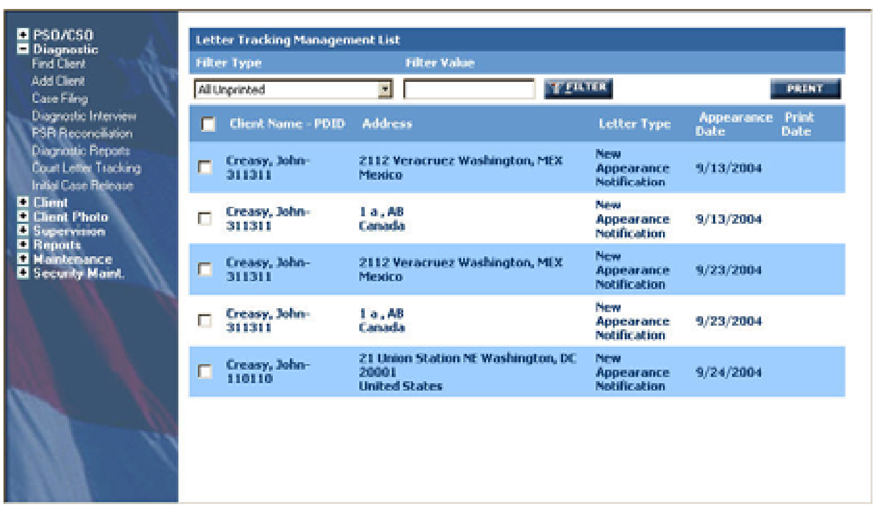
Purpose: The **Court Letter Tracking** module allows users to track the print and mail dates of Court Notification Letters as they are mailed to clients.

The Letter Tracking Management list will contain those letters that have been identified as needing generation and mailing. Users may select individual letters for printing or batch groups of letters for multiple clients.

Note: PRISM will not allow Court Notification Letters to be sent to addresses that are sealed. Addresses that have been sealed will not be displayed on the Letter Tracking Management list.

7.6.1 Generate Court Notification Letters

1. Click on the **Court Letter Tracking** module under the **Diagnostic** menu. The Letter Tracking Management list is displayed as illustrated below:



Letter Tracking Management list

2. Select a filter from the Filter Type dropdown list.
3. Record the value of the filter in the Filter Value field and click on the 

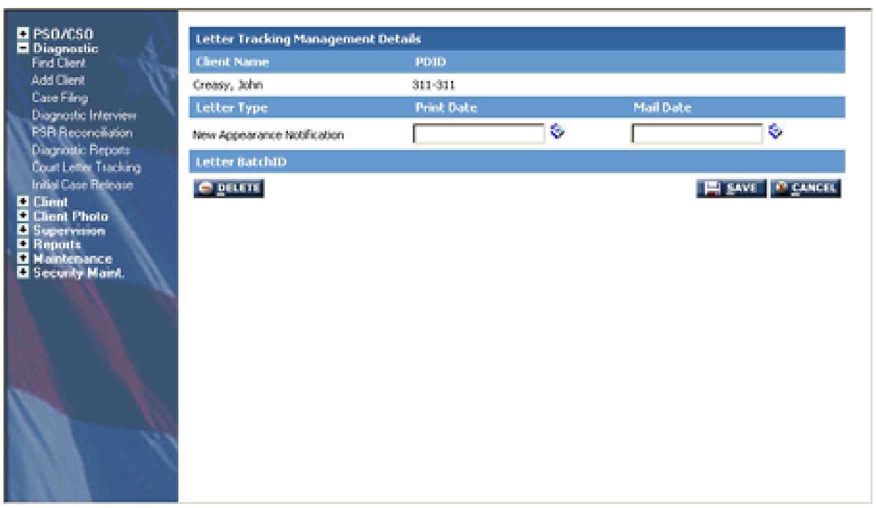
button.
4. The clients matching the filter requirements will be displayed on the Letter Tracking Management list.

5. Click on the checkboxes next to the clients for which a letter is to be generated or click on the check box next to the Client Name-PDID header to select all of the clients displayed.
6. Click 

. A new window will be opened with the Crystal Reports ActiveX Viewer displaying a preview of the reports to be generated. Click on the  button to generate the reports.

7.6.2 View/Edit/Delete Letter Tracking Management Details

1. Click on the **Court Letter Tracking** module under the **Diagnostic** menu. The Letter Tracking Management list is displayed as illustrated above.
2. Select the desired letter by clicking on any of the data displayed for the desired client. The Letter Tracking Management Details screen is displayed as illustrated below:

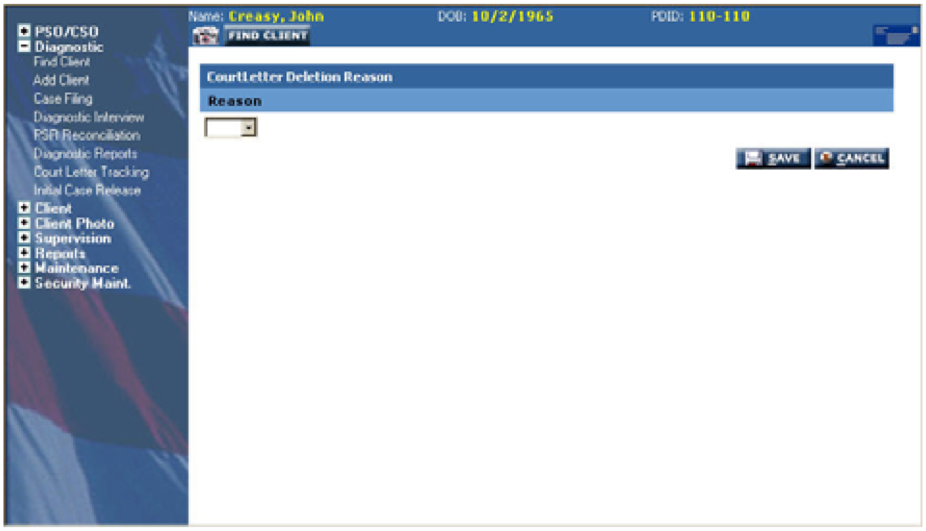


Letter Tracking Management Details

3. To edit the print or mail dates, record the desired date in the field provided and click 

. The user is returned to the Letter Tracking Management list and the edited letter is removed from the list.
4. To delete the letter, click 

. The Court Letter Deletion screen is displayed as illustrated below:



Court Letter Tracking Deletion

5. Select the reason from the dropdown list and click . The user will receive a pop up message requesting confirmation that the record is to be deleted. Click 'Ok' to delete the letter. The user is returned to the Letter Tracking Management list and the deleted letter is removed from the list.

7.7 Initial Case Release

[Intentionally Removed – 04/22/2009dkc]