PRETRIAL REALTIME INFORMATION SYSTEM MANAGER (PRISM)

Book II

Version 2.0 User Manual
("PRISM 2.9 .Net Migration" SOW edited version)

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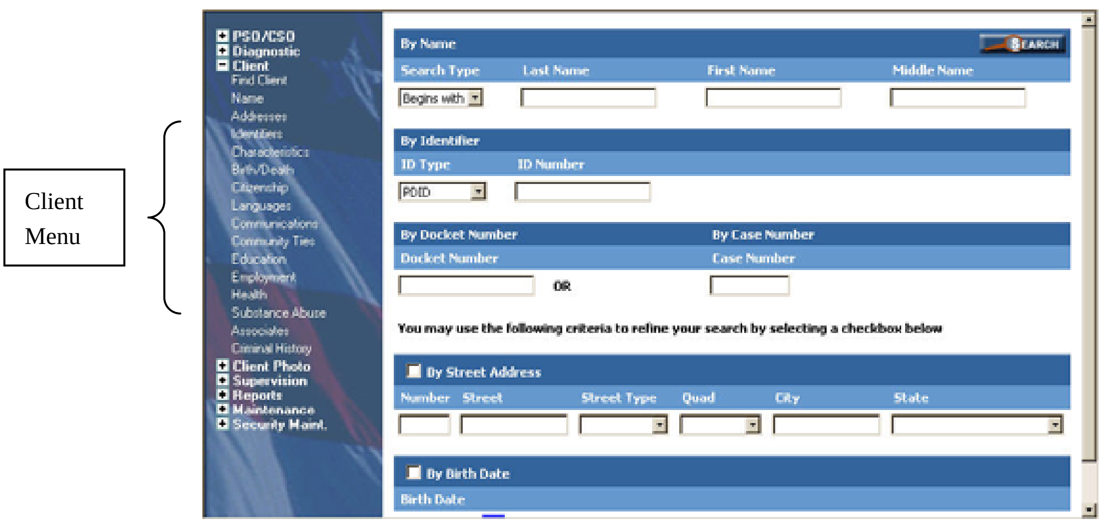
1.0 Client

Purpose: The purpose of the **Client** menu is to enter, store and retrieve all the meaningful pieces of data that describes a client. As illustrated in the figure below, the **Client** menu contains the following modules:

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



Client menu

1.1 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: In order to add a new client to PRISM, the user must **first search** for the client within the system. If after the search, the client is not located, only then can the user add the client to 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.

1.1.1 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

1.1.1.1 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 SEARCH.

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 1.1.1.5 and 1.1.1.6 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

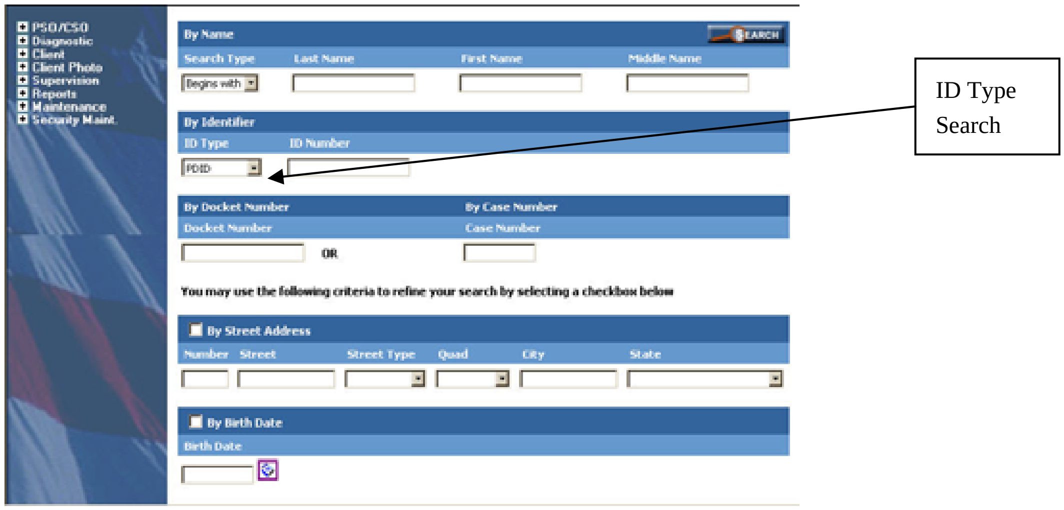
5. To select a client, hyperlink on any piece of the client’s information. If the desired client is not on the list, then return to the Find Client screen by clicking on the Find Client menu under the Client module and try searching using different criteria.

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

1.1.1.2 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.

1.1.1.3 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
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.

1.1.1.4 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.

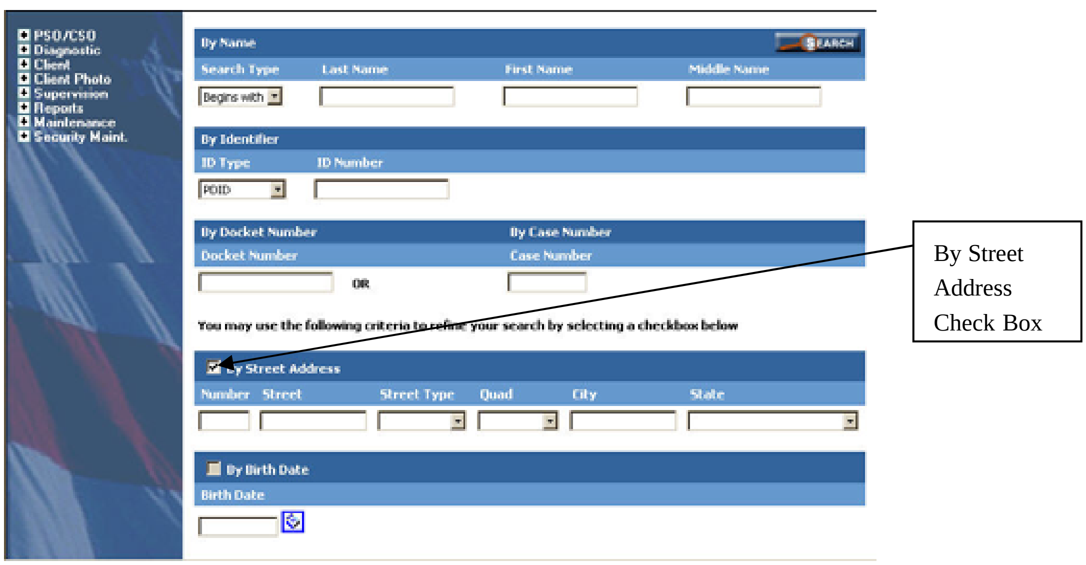
Note: Users should exhaust all available methods of searching for a client in PRISM. If it is determined that a client needs to be added, click on the 

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

1.1.1.5 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 menu 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 

.
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.

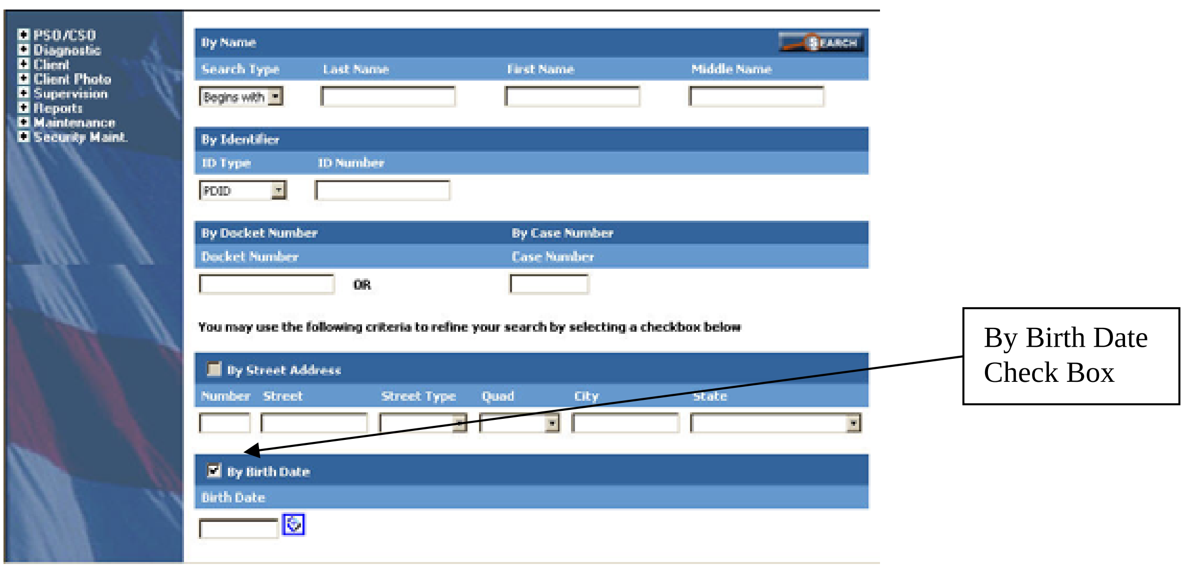
Note: Users should exhaust all available methods of searching for a client in PRISM. If it is determined that a client needs to be added, click on the 

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

1.1.1.6 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** menus.

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 

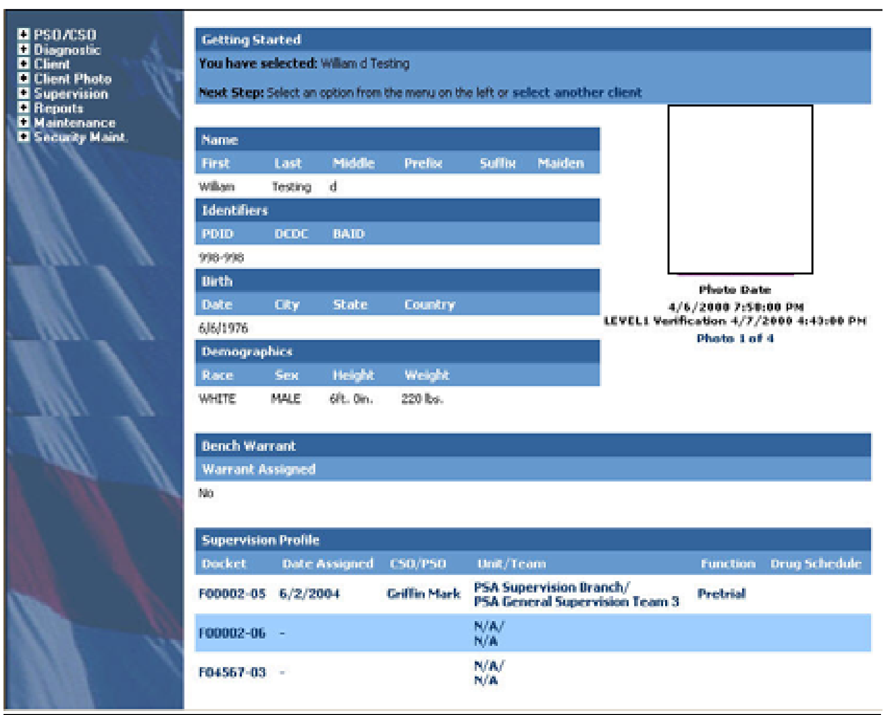
.

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

1.1.2 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.

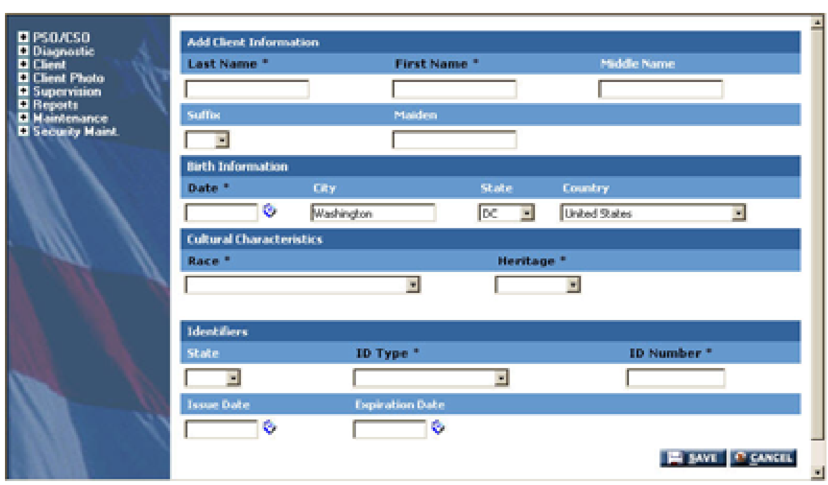
1. After performing an unsuccessful client search, click on the 

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

1.2 Name

The **Name** module is located under the **Client** menu.

Purpose: This module stores all of the names and aliases for a selected client. Client aliases may also be added using this module.

Note: By adding a name in this module, a user is not creating a new client. A user is only adding an additional name or alias to the existing client selected through the Find Client function.

1.2.1 View a Name

1. Perform the Find Client function and click on the **Name** module under the **Client** menu. The Client Name list screen is displayed as illustrated below:

Client Name list

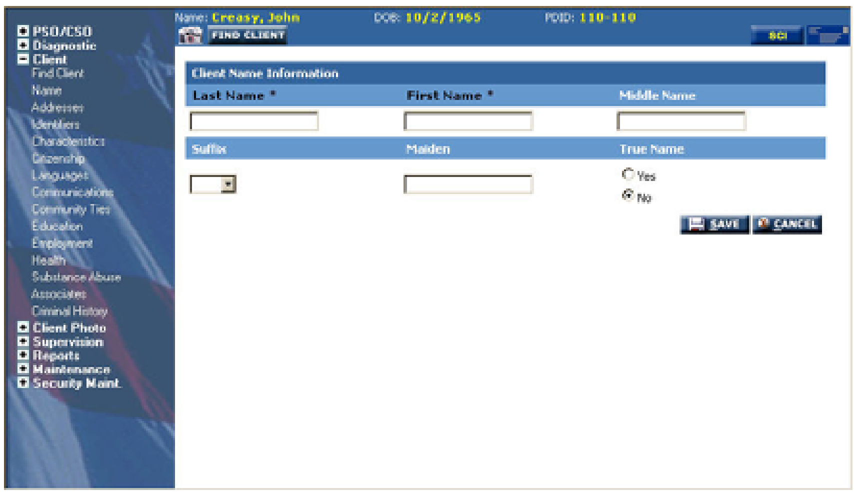
2. Hyperlink on any of the data displayed for the desired client. The Client Name form is displayed as illustrated below:

Client Name form

3. Click CANCEL to return to the list screen.

1.2.2 Add a New Name

1. Perform the Find Client function and click on the **Name** module under the **Client** menu. The Client Name list screen is displayed as illustrated above.
2. Click on the ADD button. The Client Name form is displayed as illustrated below:



Client Name form

3. Record the first and last names.
4. Record the Middle Name, Suffix, and Maiden Name as necessary.
5. Click 'Yes' or 'No' to indicate if this is the client's true name.

Note: If the user elects to click on the True Name 'Yes' radio button, PRISM will automatically change the True Name to 'No' for any other names associated with the client.

6. Click SAVE. The form is updated with the DELETE, VERIFICATION, REMARKS, and SEAL buttons added.

1.3 Addresses

The **Addresses** module is located under the **Client** menu.

Purpose: The purpose of the **Addresses** module is to record and store client residency information.

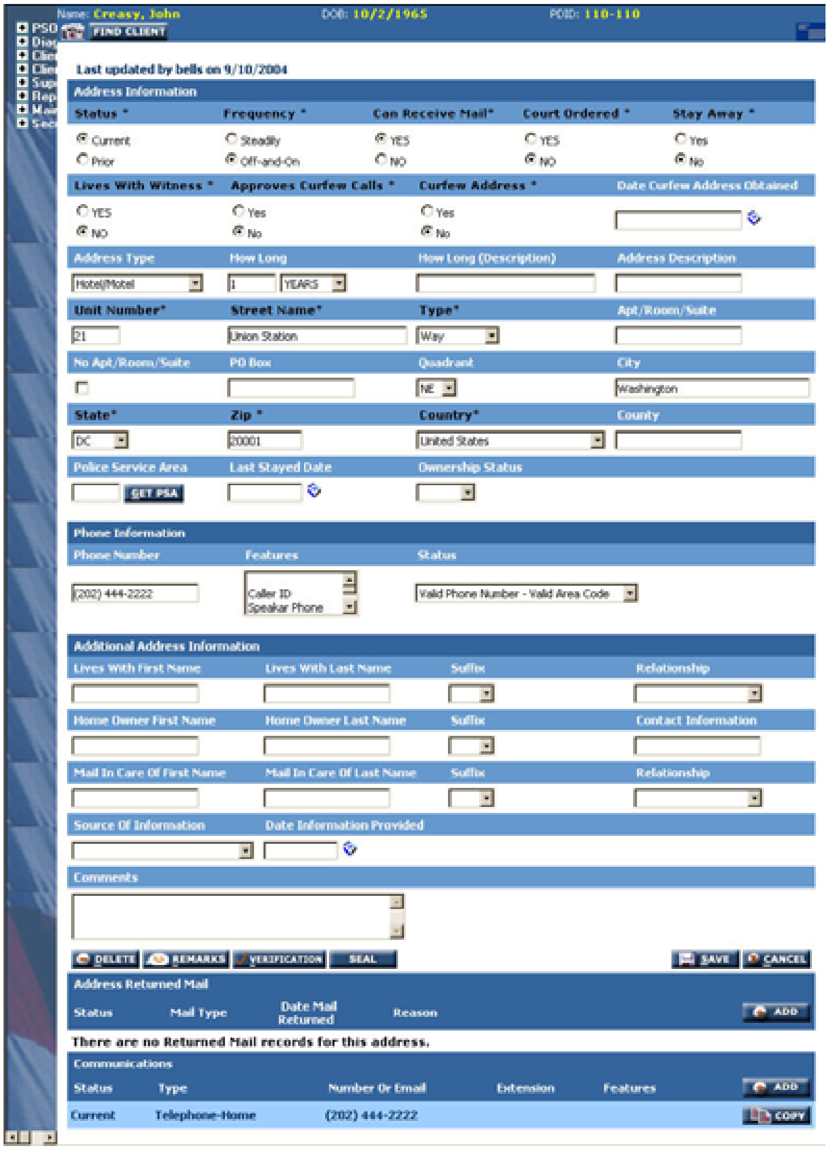
The Address form consists of three sections and two sub lists. The Address form is divided between Address Information, Phone Information, and Additional Address Information. The two sub lists found on the form are the Address Returned Mail and Communications sub lists.

1.3.1 View an Address

1. Perform the Find Client function and click on the **Addresses** module within the **Client** menu. The Address List screen is displayed as illustrated in the figure below:

Address list

2. Hyperlink on any of the data for the desired address. The Address form is displayed as illustrated in the figure below:

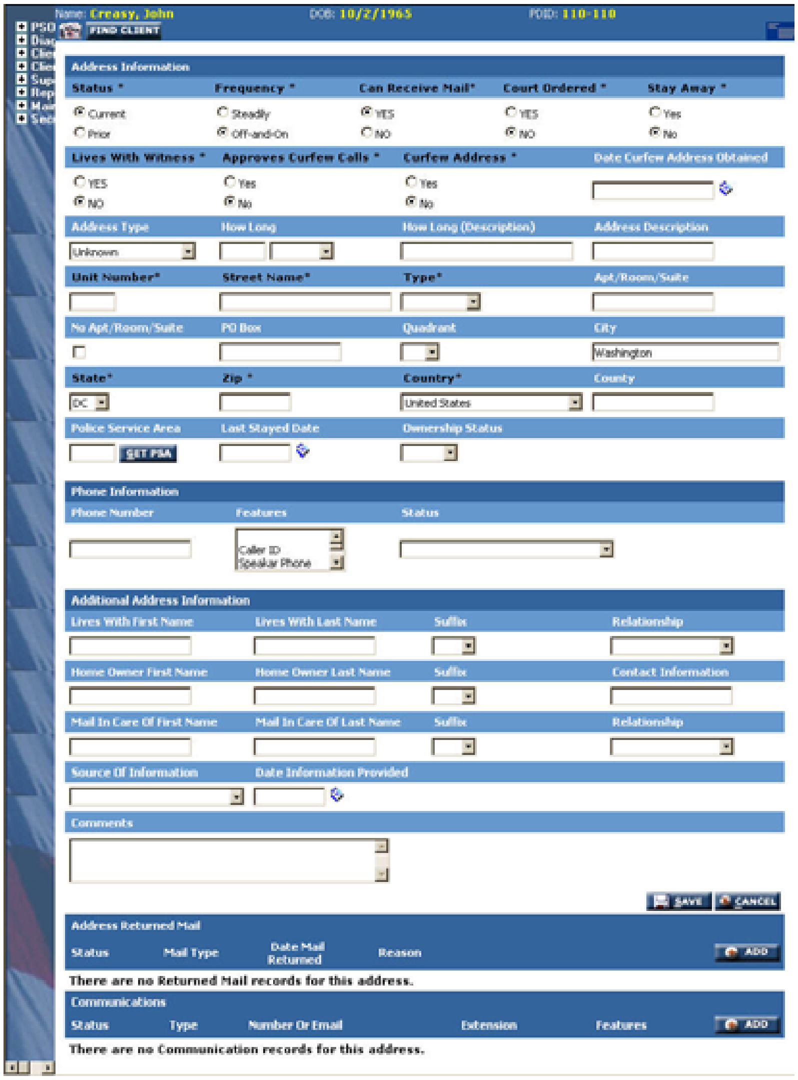


Address form

3. Click  to return to the Address List screen.

1.3.2 Add an Address (General)

1. Perform the Find Client function and click on the **Addresses** module under the **Client** menu. The Address List screen is displayed as illustrated in the figure above.
2. Click on the  button. The Address form is presented as illustrated in the figure below:



Address form

Note: Note that fields with **bold face type** and an ***** are mandatory fields and must be entered in order to save the information. Several business rules in this module may also prompt the user to record data in fields that are not denoted by the bold face type and *.

3. Select 'Current' or 'Prior' for the Status of the address. Note: 'Current' is the default setting.
4. Select 'Steadily' or 'Off-and-On' for the Frequency at which the client stays at the address. Note: 'Off-and-On' is the default setting.

5. Select ‘Yes’ or ‘No’ to indicate whether the client may receive mail at this address. Note: ‘Yes’ is the default setting
6. Click on ‘Yes’ or ‘No’ to indicate whether or not the client has been ordered through the court to stay at this address. Note: ‘No’ is the default setting.
7. Click on ‘Yes’ or ‘No’ to indicate whether or not the client has been ordered to stay away from this address. Note: ‘No’ is the default setting.
8. Click on ‘Yes’ or ‘No’ to indicate whether or not the client resides with the complaining witness at this address. Note: ‘No’ is the default setting.
9. Click on ‘Yes’ or ‘No’ to indicate if the homeowner has approved of the client staying at this address under a curfew condition. Note: ‘No’ is the default setting.

Note: The Approves Curfew Calls radio button should remain on ‘No’ until PSA has verified the address and confirmed with the homeowner that the client may stay there under a curfew condition.

10. Click on ‘Yes’ or ‘No’ to indicate if the client has indicated that this address is where he or she would reside under a curfew condition. Note: ‘No’ is the default setting.
11. If the address has been approved for curfew purposes, record the date on which the address was obtained in the Date Curfew Address Obtained field.
12. Select the type of address from the Address Type dropdown list.
13. Record the length of time that the client has lived at the address in the How Long field.
14. If necessary, record the length of time in the How Long (Description) field.
15. If necessary, populate the Address Description field with the name of the building, apartment, school, etc.
16. Record the Unit Number.
17. Record the Street Name.
18. Select a Type from the dropdown list.
19. Record the apartment, room, or suite number if applicable.
20. If the address does not have an apartment, room, or suite number, click on the No Apt/Room/Suite check box. If the check box is marked, the preceding Apt/Room/Suite field cannot be filled.
21. Select a quadrant from the Quadrant dropdown if the address is located within DC. This is a mandatory field if the City and State fields are Washington and DC.
22. Record the city in the City field if it is other than Washington. This field will automatically default to Washington.
23. Select a state from the State dropdown list if it is other than DC. This field will automatically default to DC. This field becomes non-mandatory if the country selected is not the United States, Canada or Mexico.
24. Record the zip code of the address in the Zip field. This field is not mandatory if the country selected is not the United States.
25. Select the country from the Country dropdown. This field will automatically default to United States.
26. If applicable, record the county of the address in the field provided.

Note: The  button is intended to allow the user to find the Patrol Service Area for the designated address. By clicking on this button, the user is linked the DC Metropolitan Police Department (MPDC) website. The MPDC website does not currently provide the capability to locate a PSA.

27. If known, record the date on which the client last stayed at the address in the Last Stayed Date field.
28. If known, select ‘Buy’, ‘Neither’, or ‘Rent’ for the client’s ownership status at the address.
29. Record the client’s phone number in the Phone Number field. PRISM will format the phone number automatically and correctly without the need to record either brackets or hyphens.
30. If known, click on the features that are present on the phone number recorded using the Features text box that permits multiple selections. To select multiple features, a user must hold down the Ctrl button while clicking on each entry.

Note: When a phone number is recorded in the Phone Information fields, PRISM will automatically create a new corresponding record under the Communications sub list.

31. Select a status from the Status dropdown.
32. Record additional information related to the address in the Additional Address Information fields.
33. Click . The Address form will be updated with the , , , and  buttons added to the screen.

1.3.2.1 Add A New Address (PO Box)

1. In the **Client** module, click on the Address tab. The Address list screen is displayed as illustrated previously.
2. Click on the  button. The Address form is displayed as illustrated previously.
3. Select either the ‘Current’ or ‘Prior’ Status radio button. Note: ‘Current’ is the default setting.
4. Select either the ‘Steadily’ or ‘Off-and-On’ Frequency radio button. Note: ‘Off-and-On’ is the default setting.
5. Select either the ‘YES’ or ‘NO’ Can Receive Mail radio button. Note: ‘YES’ is the default setting.
6. Select either the ‘YES’ or ‘NO’ Court Ordered radio button. Note: ‘No’ is the default setting.
7. Select either the ‘Yes’ or ‘No’ Stay Away radio button. Note: ‘No’ is the default setting.
8. Select either the ‘YES’ or ‘NO’ Lives With Witness radio button. Note: ‘NO’ is the default setting.

9. Select either the 'Yes' or 'No' Approves Curfew Calls radio button. Note: 'No' is the default setting.
10. Select either the 'Yes' or 'No' Curfew Address radio button. Note: 'No' is the default setting.
11. Select 'PO Box' from the Address Type dropdown list.
12. Record the length of time from the How Long fields.
13. If necessary, record the length of time in the How Long (Description) field.
14. If necessary, populate the Address Description field with the name of the building, apartment, school, etc.
15. Record the PO Box number in the PO Box field.

Note: Unit Number, Street Name, and Type are not mandatory fields if PO Box is selected from the Address Type dropdown list. If PO Box is selected as the Address Type, PO Box is a mandatory field.

16. Select a quadrant from the Quadrant dropdown if the address is located within DC.
17. Record the city name in the City field if it is other than Washington. This field will automatically default to Washington.
18. Select a state from the State dropdown list if it is other than DC. This field will automatically default to DC. This field becomes non-mandatory if the country selected is not the United States, Canada or Mexico.
19. Record the zip code of the address in the Zip field. This field is not mandatory if the country selected is not the United States.
20. Select the country from the Country dropdown list. This field will automatically default to United States.
21. If known, record the county name in the County field.
22. If known, record the date on which the client last stayed at the address in the Last Stayed Date field.
23. If known, select 'Buy', 'Neither', or 'Rent' for the client's ownership status at the address.
24. Record the client's phone number in the Phone Number field. PRISM will format the phone number automatically and correctly without the need to record either brackets or hyphens.
25. If known, click on the features that are present on the phone number recorded using the Features text box that permits multiple selections. To select multiple features, a user must hold down the Ctrl button while clicking on each entry.
26. Select a status from the Status dropdown.
27. Record additional information related to the address in the Additional Address Information fields.
28. Click  to save the information recorded. The DI Address form will be updated with the  ,  , and  , buttons added to the screen.

1.3.2.2 Add a New Address (Homeless)

1. In the **Client** module, click on the Address tab. The Address list screen is displayed as previously illustrated.
2. Click on the 

button. The Address form is displayed as illustrated previously.
3. Select either the 'Current' or 'Prior' Status radio button. Note: 'Current' is the default setting.
4. Select either the 'Steadily' or 'Off-and-On' Frequency radio button. Note: 'Off-and-On' is the default setting.
5. Select 'Homeless' from the Address Type dropdown list.

Note: If Homeless is selected for the Address Type, the Street Name field will automatically be populated with the phrase "No Fixed Address". Unit Number, Street Name, Type, Zip, and Country are no longer mandatory fields when 'Homeless' is the Address Type.

6. Select a City and State from the City and State dropdown lists. These fields default to Washington and DC respectively.
7. Click 

to save the information recorded. The DI Address form will be updated with the 

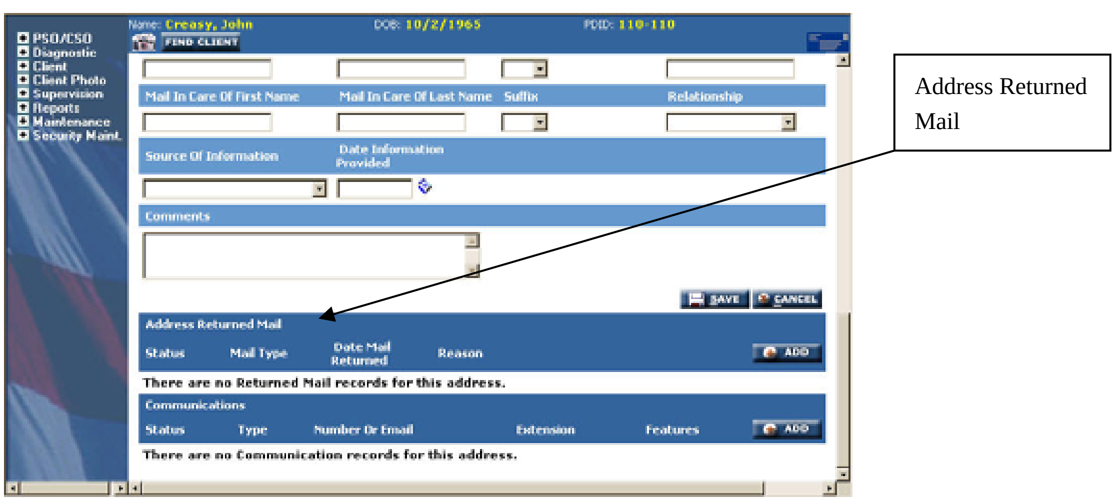
, 

, and 

, buttons added to the screen.

1.3.3 Add Address Returned Mail

The Address Returned Mail function is located on the bottom of the Client Address screen as shown in the figure below. This function allows users to log into PRISM any returned mail from a client's address along with the date the mail was returned, the type of mail being returned and why the mail was returned.



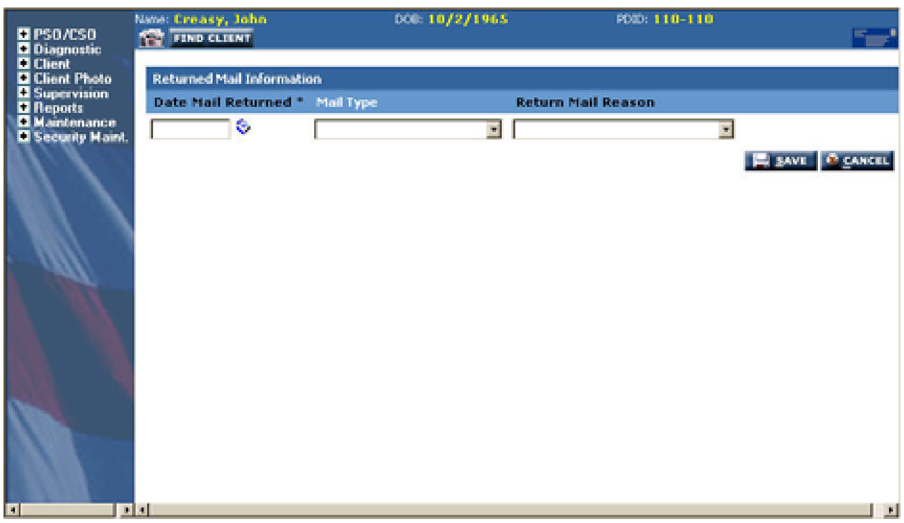
Address form

Note: New address information at the top of the Address form must first be saved before this function may be used.

Note: To view existing returned mail information, single click on any of the records listed under Address Returned Mail.

1. Perform the Find Client function for the client for whom PSA has received returned mail. Click on the **Addresses** module under the **Client** menu and select the address from which the mail was returned by hyperlinking on any of the data displayed.
2. Click on the 

button located on the Address Returned Mail sub list illustrated in the figure above. The Returned Mail Form will be displayed as illustrated in the figure below:



Returned Mail form

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

3. Record the date the mail was returned.
4. Select the type of mail returned from the dropdown list.
5. Select the reason returned from the dropdown list.
6. Click 

. The information added is displayed in the Address form under the Address Returned Mail sub list.

1.3.4 Add Communications

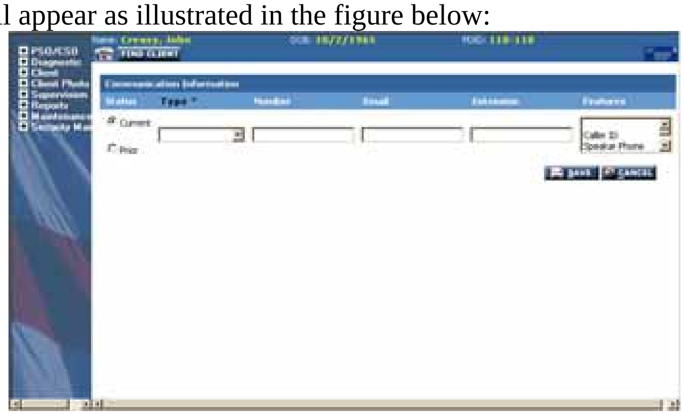
The Communications information is located on the bottom of the Address Form as illustrated in the figure below. The Address Communication is for the user to gather all types of communications for the client at that particular address. (i.e., Telephone, Cell phone, Fax, Pager)

Address form

Note: A user may not add communication information to this module until after the address information on the Address form has been saved.

Note: To view existing Communications data, single click on any of the records that appear under Communications.

1. Perform the Find Client function and click on the **Addresses** module under the **Client** menu. The Address List screen is displayed as illustrated above.
2. Select the address desired by hyperlinking on any of the data displayed.
3. Click on the  button on the Communications sub list. The Communications Form will appear as illustrated in the figure below:



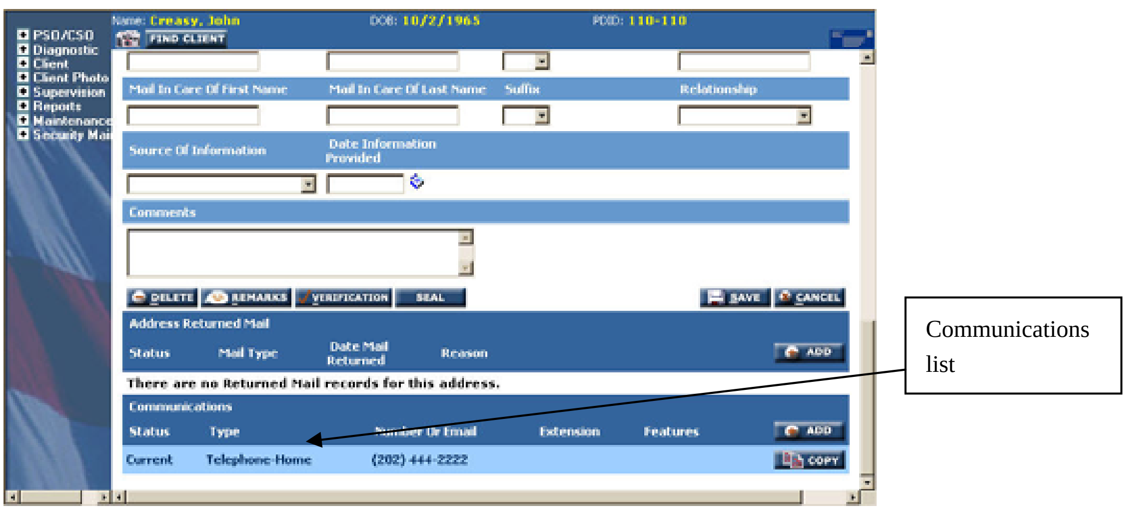
Communications form

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

4. Fill in the pertinent information regarding the following:
   a. Current or Prior Status
   b. Type
   c. Number
   d. Extension of Number

Note: If the user selects 'Email' from the Type dropdown, data may not be recorded into either the Number or Extension fields. PRISM will format phone numbers automatically and correctly without the need for brackets or hyphens.

5. If known, use the text box that permits multiple selections to indicate what features are found on the communication being added.
6. Click SAVE. The user is returned to the Address form with the saved information displayed under the Communications sub list as illustrated in the figure below:



Communications list

1.4 Identifiers

The **Identifiers** module is located within the **Client** menu.

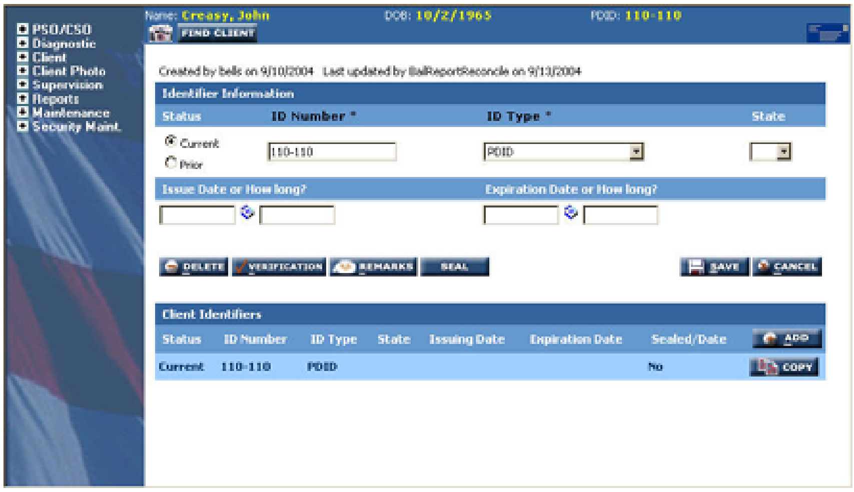
Purpose: The purpose of the Identifiers screen is to allow the user to add identifiers to the client's records. Acceptable identifiers to add are FBI #, PDID #, DCDC#, Temporary Testing #, CSSID, CSS Testing #, Social File Number, and X-Ref.

1.4.1 View Identifier Information

1. Perform the Find Client and click on the **Identifiers** module in the **Client** menu. The Client Identifiers list is displayed as illustrated below:

Client Identifiers list

2. Click on any of the data displayed for the desired record under the Client Identifiers sub list. The Client Identifiers form is displayed as illustrated below:

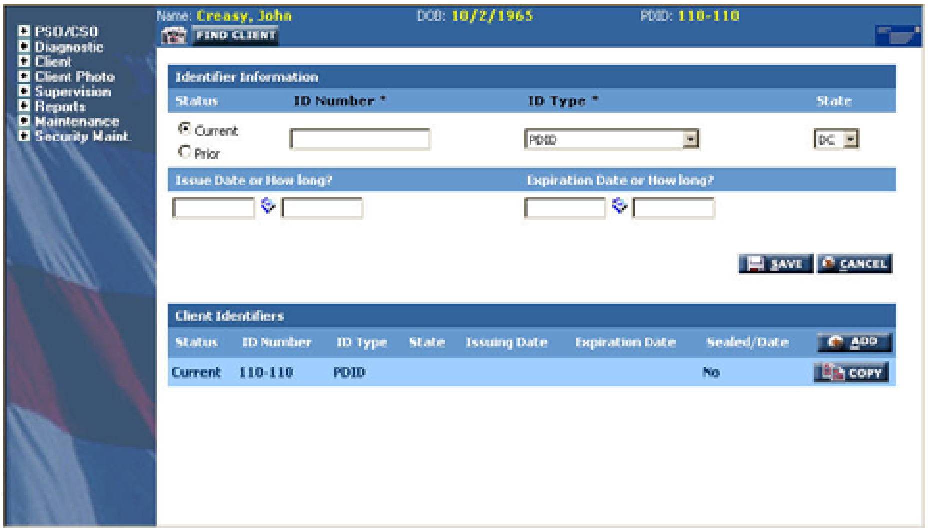


Client Identifiers form

3. Click  to return to the Client Identifiers list screen.

1.4.2 Add an Identifier

1. Perform the Find Client function and then click on the **Identifiers** module under the **Client** menu. The Client Identifiers list is presented as illustrated in the figure above.
2. Click on the  button. The Identifiers form is presented as illustrated in the figure below:



Client Identifiers form

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

3. Select Current or Prior Status button (Note: Status defaults to Current)
4. Enter the number in the ID Number field.

Note: If PDID number is the identifier being added, the value must be six characters in length. A user is not required to record a hyphen in the middle of the digits. PRISM will not permit a user to add a PDID number to a client who has one already on file.

5. Select the type of identifier from ID Type drop down menu.
6. Populate the remaining fields if applicable.
7. Click 

. The user is returned to the Client Identifiers list screen with newly saved information displayed under the Client Identifiers sub list.

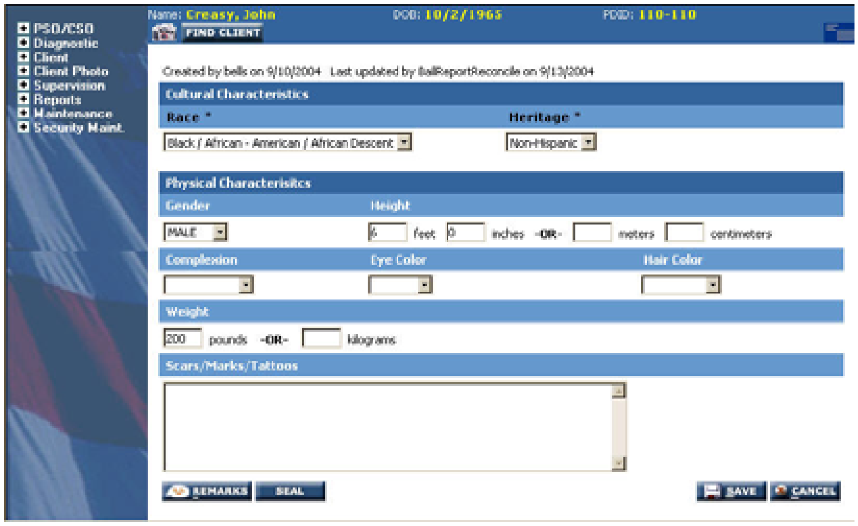
1.5 Characteristics

The **Characteristics** module is located under the **Client** menu.

Purpose: The purpose of this form is to allow the user to enter cultural and physical characteristic information for the client. The Characteristics Form will be launched automatically when selected from the **Client** module. There are six (6) federally mandated designations for RACE identifications, and the standard two (2) for Heritage classification.

1.5.1 View/Modify Cultural Characteristics

1. Perform the Find Client function and then click on the **Characteristics** module in the **Client** module. The Client Characteristics form screen will appear as illustrated in the figure below:



Characteristics form

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

2. Select a race category from the Race dropdown list.
3. Select Non-Hispanic or Hispanic from the Heritage dropdown list.
4. Select Male or Female from the Gender dropdown list.
5. Record the client's remaining physical characteristics.

Note: In the Height fields, users must either record the information in feet/inches or meters/centimeters, not both. Likewise, in the Weight fields, users must either record the information in pounds or kilograms, not both.

6. To save the information added, click 
.

1.6 Birth/Death

The **Birth/Death** module is located under the **Client** menu.

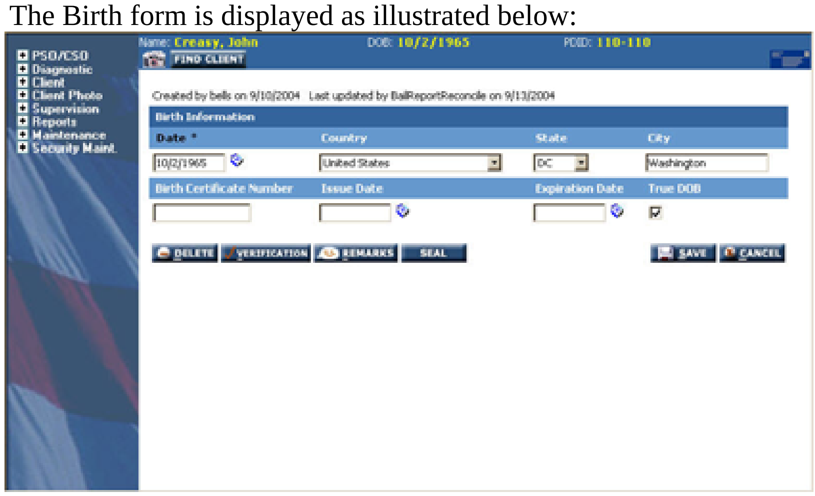
Purpose: The purpose of this screen is to allow the user to enter and verify Date of Birth information as well as Date of Death information.

1.6.1 View Date of Birth Information

1. Perform the Find Client function and click on the **Birth/Death** module under the **Client** menu. The Birth/Death List screen will appear as illustrated in the figure below:

Birth/Death list

2. Hyperlink on any of the data displayed for the desired record under the Date of Birth sub list. The Birth form is displayed as illustrated below:

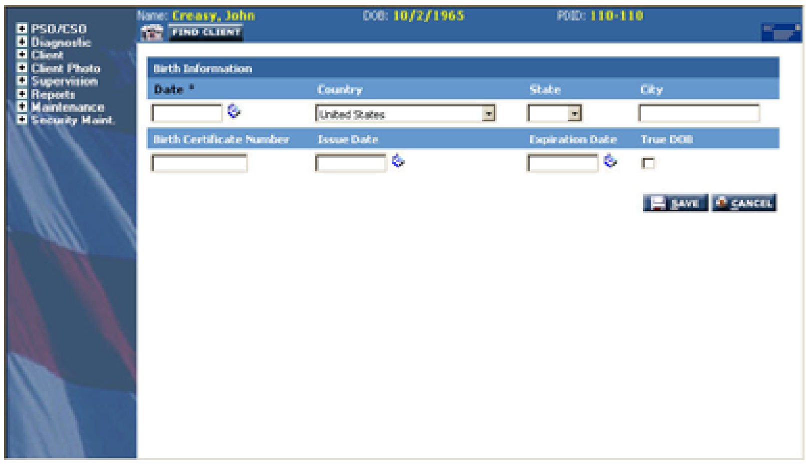


Birth form

3. Click  to return to the Birth/Death List screen.

1.6.2 Add Date of Birth Information

1. Perform the Find Client function and click on the **Birth/Death** module under the **Client** menu. The Birth/Death List screen will appear as illustrated in the figure above.
2. Click on the  button in the Date of Birth sub list. The Birth Form will appear as illustrated in the figure below:



Birth form

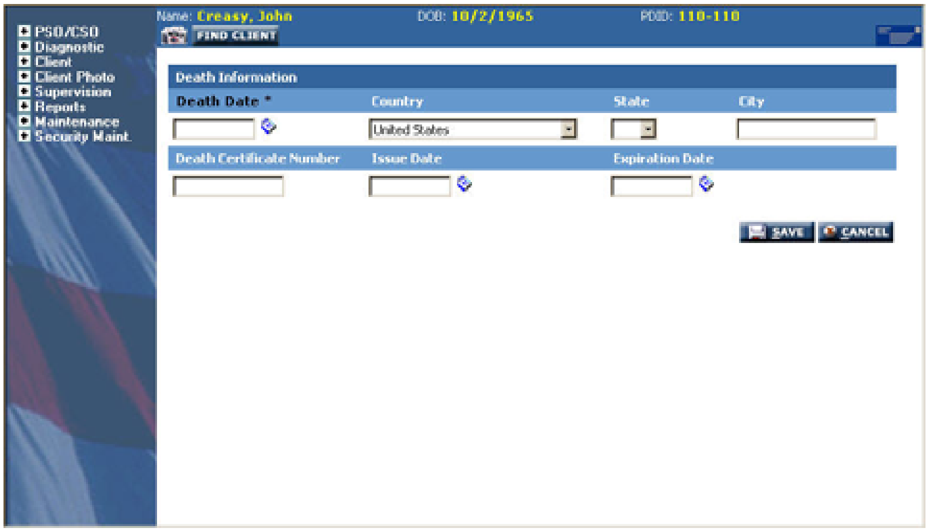
Note: Note that fields with **bold face type** and an ***** are mandatory fields and must be entered in order to save the information.

3. Populate the fields in the Birth Information screen as necessary.
4. Click  . The form screen is updated with the  ,  ,  , and  buttons added to the screen.

Note: If a client has more than one Date of Birth recorded in PRISM, a user must mark the True DOB checkbox for one of the records.

1.6.3 View Date of Death Information

1. Perform the Find Client function and then click on the **Birth/Death** module in the **Client** menu. The Birth/Death list will appear as illustrated in the figure above.
2. Click on any of the data displayed for the desired record under the Date of Death sub list. The Death form is displayed as illustrated below:

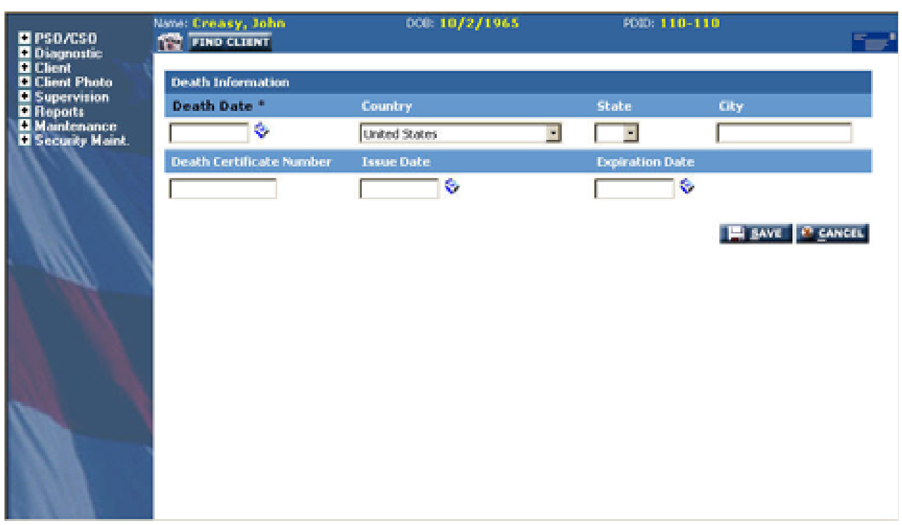


Death form

3. Click  to return to the Birth/Death List screen.

1.6.4 Add Date of Death Information

1. Perform the Find Client function and then click on the **Birth/Death** module under the **Client** menu. The Birth/Death list will appear as illustrated in the figure above.
2. Click on the  button in the Date of Death sub list. The Death form will appear as illustrated in the figure below:



Death form

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

Note: After a date of death is added for a client, the button disappears from the Date of Death sub list. You may modify date of death information, but a client may only have one date of death.

3. Populate the fields in the Death Information screen as necessary.
4. Click . The user is returned to the Birth/Death List screen and the newly added information is displayed under the Date of Death sub list.

WARNING: Once a verification record has been added to a Date of Death, the verification cannot be changed.

Note: Users may not delete a date of death.

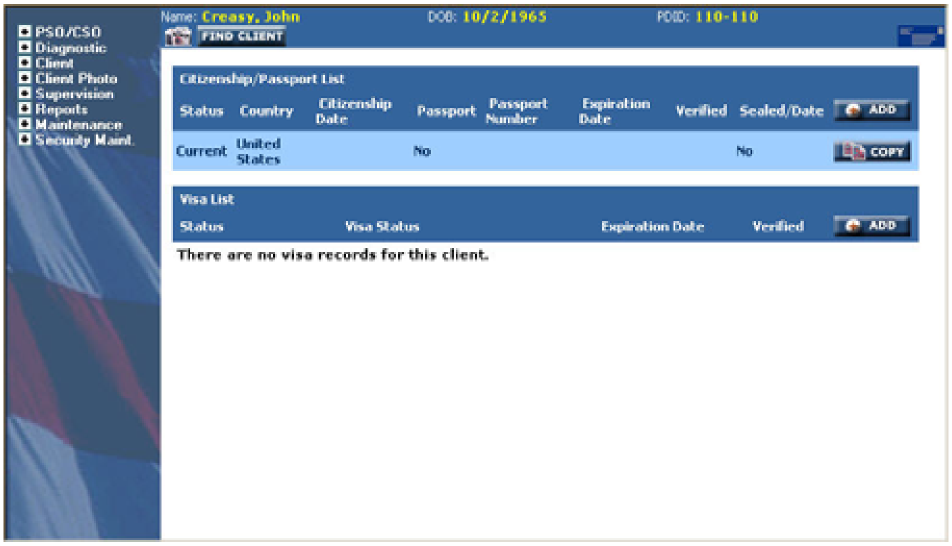
1.7 Citizenship

The **Citizenship** module is located under the **Client** menu.

Purpose: The purpose of this function is to add details about the client's country of citizenship, passport, and visa information.

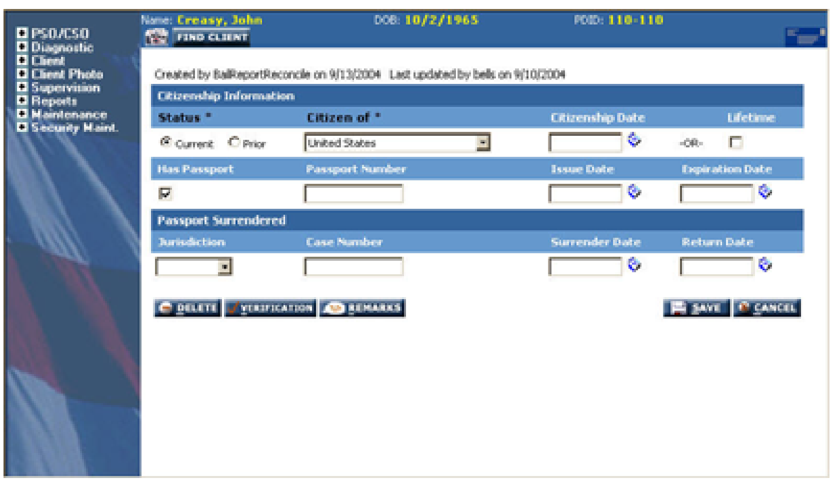
1.7.1 View Citizenship/Passport or Visa Information

1. Perform the Find Client function and click on the **Citizenship** module under the **Client** menu. The Citizenship list screen is displayed as illustrated below:



Citizenship list

2. Click on any of the data displayed for the desired record under the Citizenship/Passport or Visa list to enter into the Citizenship or Visa form screen. The Citizenship form screen is displayed as illustrated below:



Citizenship form

3. Click  to return to the Citizenship list screen.

1.7.2 Add New Citizenship/Passport Information

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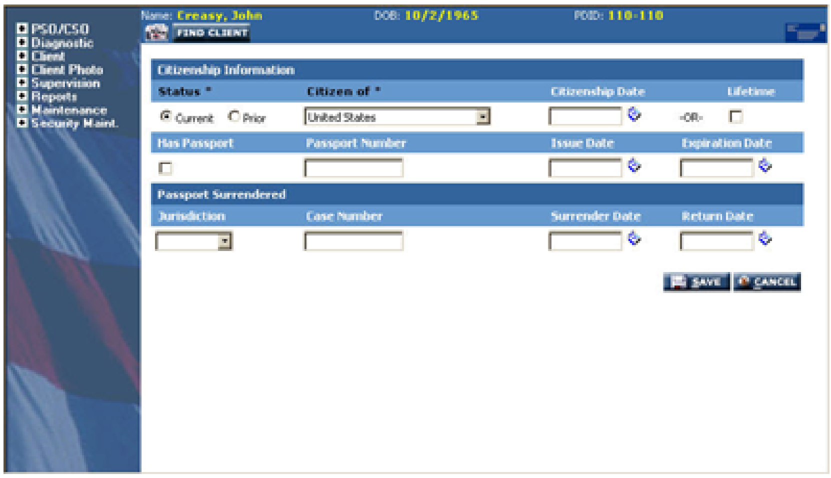
1. Perform the Find Client function and then click on the **Citizenship** module under the **Client** menu. The Citizenship list screen will appear as illustrated previously.
2. Click on the 

button on the Citizenship/Passport sub list. The Citizenship form is displayed as illustrated in the figure below:

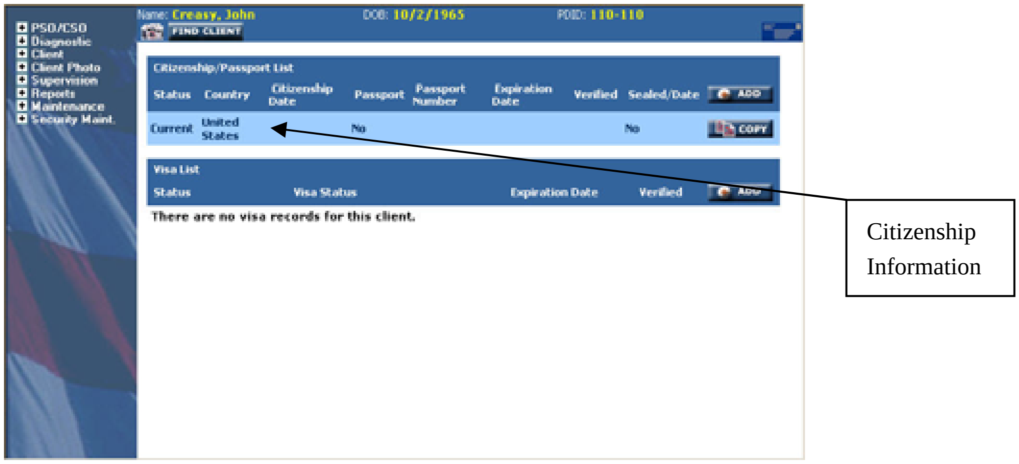


Citizenship form

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

3. Select Current or Prior Status.
4. Choose the country of citizenship from the Citizen Of dropdown box.
5. Enter a date in the Citizenship date selector field or check "Lifetime" if client has been a citizen since birth. Client's date of birth is inserted in Citizenship Date if Lifetime is checked.
6. If the client possesses passport, check the Has Passport box and fill in appropriate information.
7. Click 

. The user is returned to the Citizenship/Passport and Visa list screen with the saved information displayed under the Citizenship/Passport sub list as illustrated in the figure below:



Citizenship list

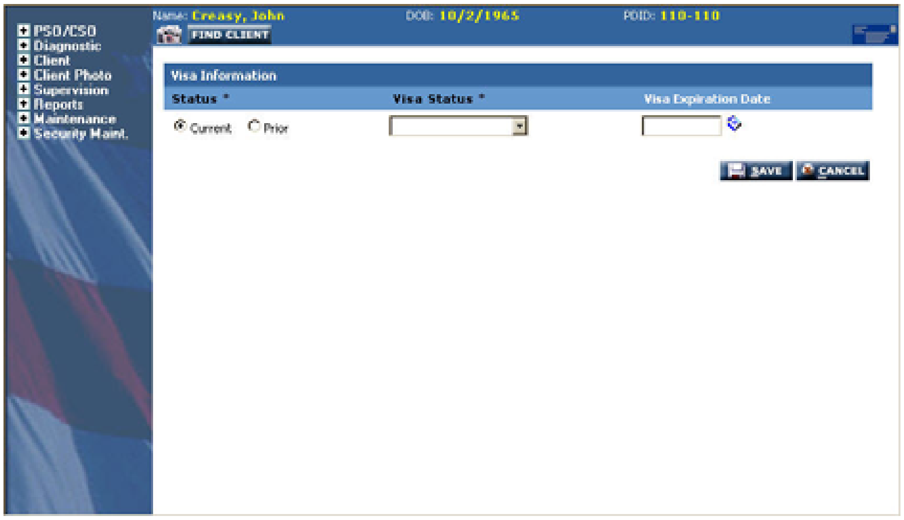
1.7.2.1 Add Passport Surrendered Information

Note: If the client must surrender his/her passport as a condition of release, make sure to verify passport information such as number, issue date and expiration date have been entered.

1. Perform the Find Client function and then click on the **Citizenship** module in the **Client** menu. The Citizenship list screen will appear as illustrated previously.
2. Click on any of the data displayed for the desired record to enter into the Citizenship form screen. The Citizenship form screen is displayed as illustrated above.
3. Under the Passport Surrendered sub list, choose the Jurisdiction from the dropdown menu to which the client surrendered his/her passport.
4. Record Case number.
5. Record the surrender date.
6. Record the Return Date of passport was returned.
7. Click  to return to the Citizenship list screen.

1.7.3 Add Visa Information

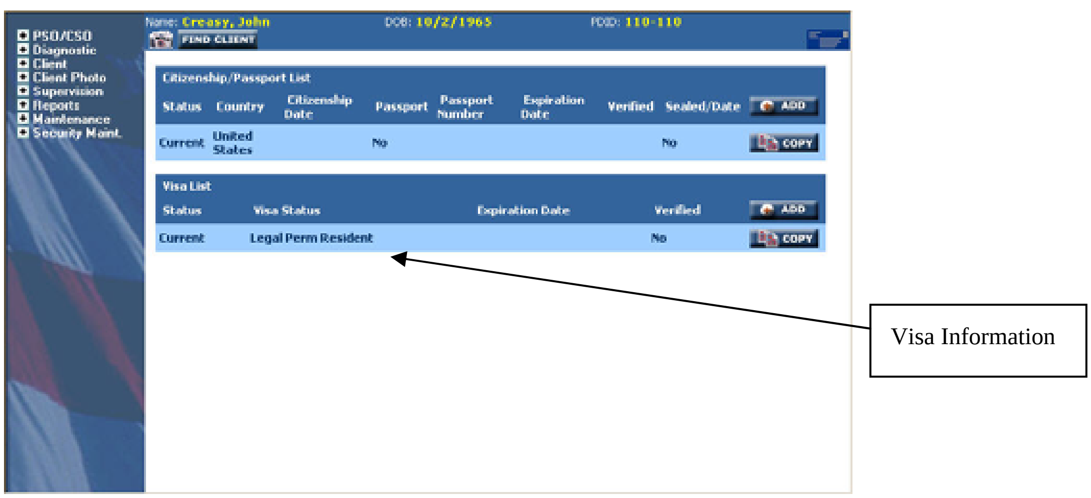
1. Perform the Find Client function and then click on the **Citizenship** module under the **Client** menu. The Citizenship list screen will appear as illustrated in the figure above.
2. Click on the  button on the Visa List.
3. The Visa List form is presented as illustrated in the figure below:



Visa form

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

4. Select Current or Prior Status.
5. Select Visa Status from the dropdown.
6. Enter the Visa Expiration Date if available.
7. Click  to return to the Citizenship List screen. The information just added will appear under Visa List as illustrated in the figure below:



Visa list

1.8 Languages

The **Language** module can be located under the **Client** menu.

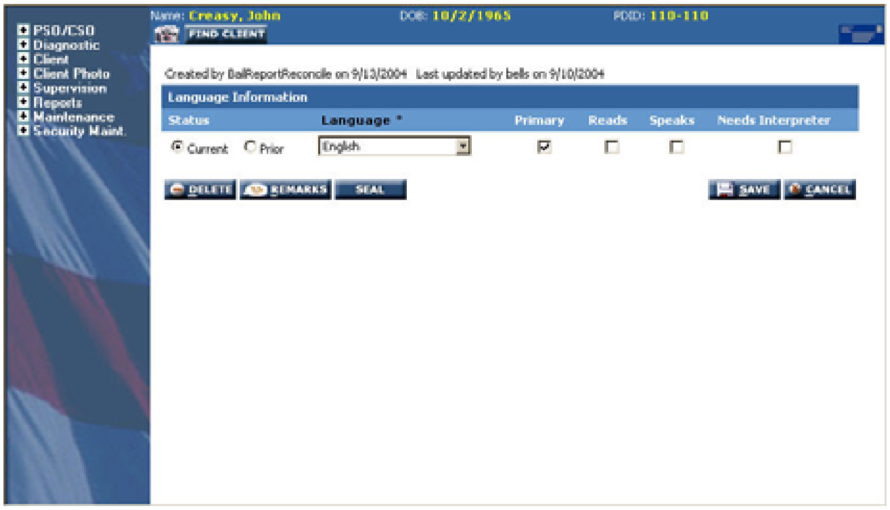
Purpose: The purpose of the Language screen is to capture the primary language the client speaks, and to indicate if the client is in need of any special accommodation(s) by the Agency in regards to his/her language.

1.8.1 View Language Information

1. Perform the Find Client function and then click on the **Language** module under the **Client** menu. The Language List screen is presented as illustrated in the figure below:

Language list

2. Hyperlink on any of the data displayed for the desired record to enter into the Language form screen. The Language form screen is displayed as illustrated below:

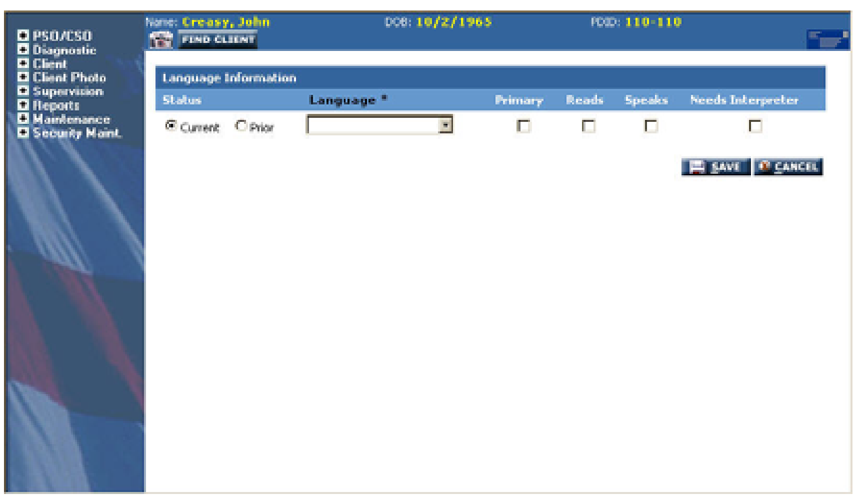


Language form

3. Click  to return to the Language List screen.

1.8.2 Add Language Information

1. Perform the Find Client function and then click on the **Language** module in the **Client** menu. The Language List screen is presented as illustrated in the figure above.
2. Click on the  button. The Language Form is presented as illustrated in the figure below:

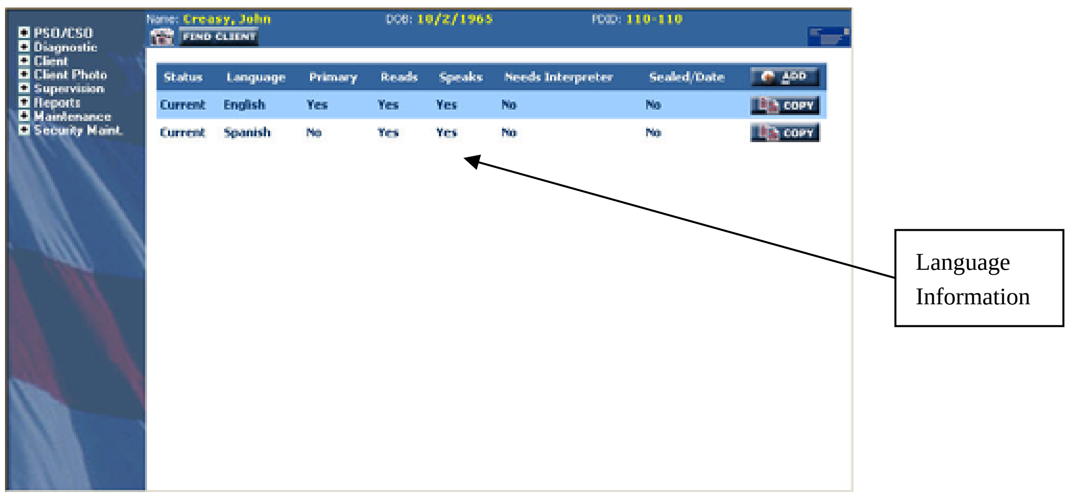


Language form

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

3. Select Current or Prior Status (Note: Status is Current by default).
4. Select Language from Language drop down menu.
5. Check off the Primary, Reads, Speaks, and Needs Interpreter boxes as appropriate.
6. Click 

. The Language List screen is presented with saved information displayed in the list as illustrated in the figure below:



Language list

1.9 Communications

The **Communications** module is located under the **Client** menu.

Purpose: The purpose of the **Communications** screen is to allow the user to input communication information such as phone numbers for the client.

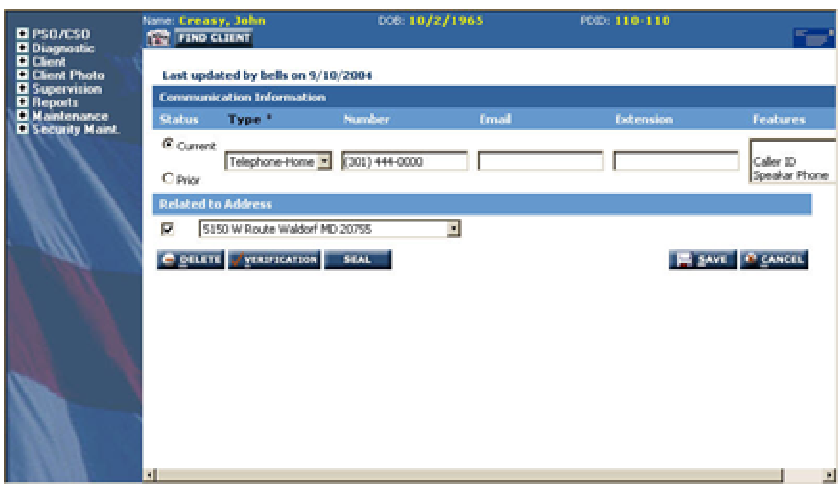
Note: Communication information related to specific addresses may also be added through the **Addresses** and **Diagnostic Interview** modules.

1.9.1 View Communications Information

1 Perform the Find Client function and then click on the **Communications** module under the **Client** menu. The Communications list screen is displayed as illustrated below:

Client Communications list

2 Hyperlink on any of the data displayed for the desired record to enter into the Communications form screen. The Communications form screen is displayed as illustrated below:



Client Communications form

3 Click 

to return to the Communications list screen.

1.9.2 Add Communications Information

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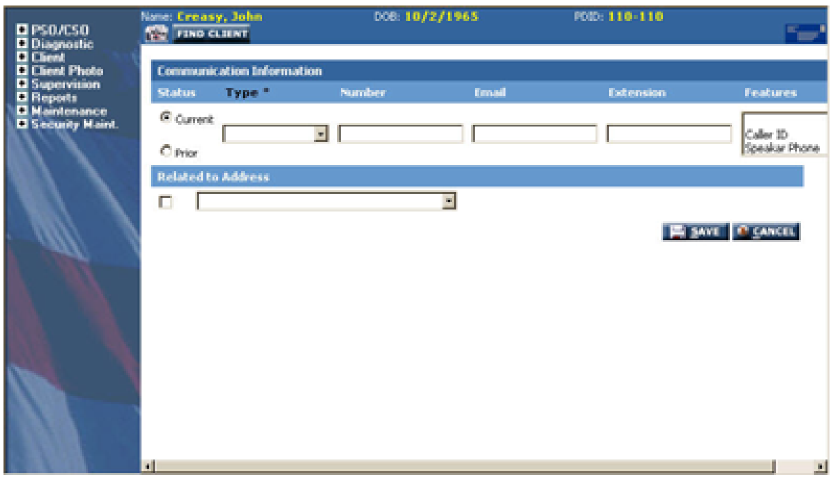
1. Perform the Find Client function and then click on the **Communications** module under the **Client** menu. The Communications list screen is presented as illustrated above.
2. Click on the  button on the Contact list. The Communications form is displayed as illustrated in the figure below:



Client Communications form

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

3. Fill in the pertinent information regarding the following:
   a. Current or Prior Status
   b. Type
   c. Number
   d. Email
   e. Extension of Number (if known)
   f. Features

4. If known, use the text box that permits multiple selections to indicate what features are found on communication being added.
5. If the communication is related to specific address (i.e., home telephone), click on the checkbox under the Related to Address header and select the corresponding address from the dropdown list.
6. Click . The user is returned to Communication List screen with saved information displayed in the list as illustrated in the figure below:

Client Communications list

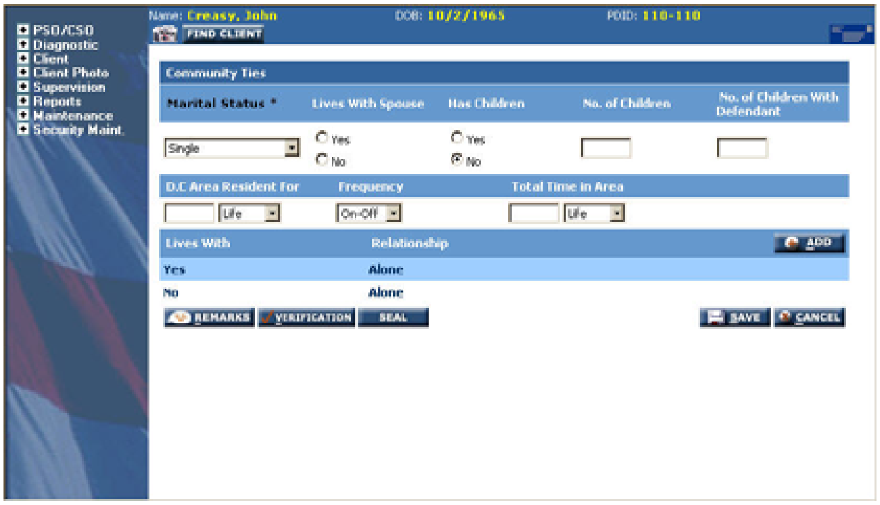
<u>1.10 Community Ties</u>

The **Community Ties** module is located under the **Client** menu.

Purpose: The purpose of the **Community Ties** module is to record the client's marital status, area residency information, and the ties to the community in the form of relatives residing in the area.

1.10.1 View/Add Community Ties Information

1. Perform the Find Client function and click on the **Community Ties** module under the **Client** menu. The Community Ties form is displayed as illustrated below:



Community Ties form

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

2 Select the client's marital status from the Marital Status dropdown list.
3 If applicable click on either the 'Yes' or 'No' Lives With Spouse radio button to indicate if the client currently resides his or her spouse.
4. Click on either the 'Yes' or 'No' Has Children radio button to indicate if the client has any children.
5. If the Has Children radio button is 'Yes', record the number of the children the client has in the No. of Children field.
6. If the Has Children radio button is 'Yes', record the number of children residing with the client in the No. of Children With Defendant field.
7. Record the length of time that the client has lived in the DC area in the D.C. Area Resident for field. If a user selects 'Life' from the dropdown list, the number text box is not required to be populated.
8. Select the frequency in which the client has resided in the DC area.
9. Record the total length of time that the client has lived in the DC area in the Total Time in Area field. If a user selects 'Life' from the dropdown list, the number text box is not required to be populated.
10. Click 

. The Community Ties form is updated to reflect the newly added information.

1.10.1.1 Add Lives With Information to Community Ties

1. Perform the Find Client function and click on the **Community Ties** module under the **Client** menu. The Community Ties form is displayed as illustrated above.

2. Click on the 

button. The Relatives Residing In DC Area form is displayed as illustrated below:

Relatives Residing in DC Area form

3. In the text boxes multiple selections are allowed. Click on all of the relationships that apply with respect to the persons who live with and who do not live with the client.

Note: To select more than one value in a text box, hold down the CTRL button on the keyboard when clicking on the selections.

4. Click 

. The user is returned to the Community Ties and the newly added information is listed under the Lives With and Relationship headers.

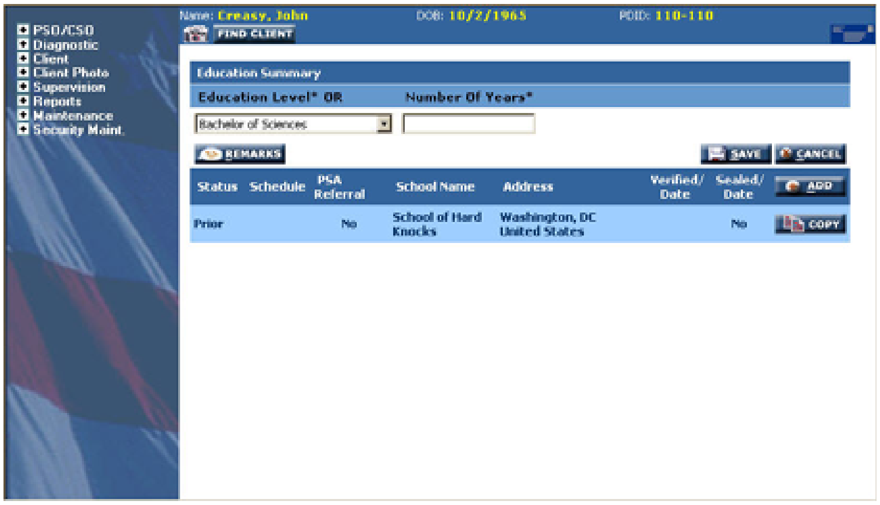
1.11 Education

The **Education** module is located under the **Client** menu.

Purpose: The purpose of the **Education** module is to record a client's education information.

1.11.1 View/Add Education Summary Information

1 Perform the Find Client function and click on the **Education** module under the **Client** menu. The Education Summary form and Education list screen are displayed as illustrated below:



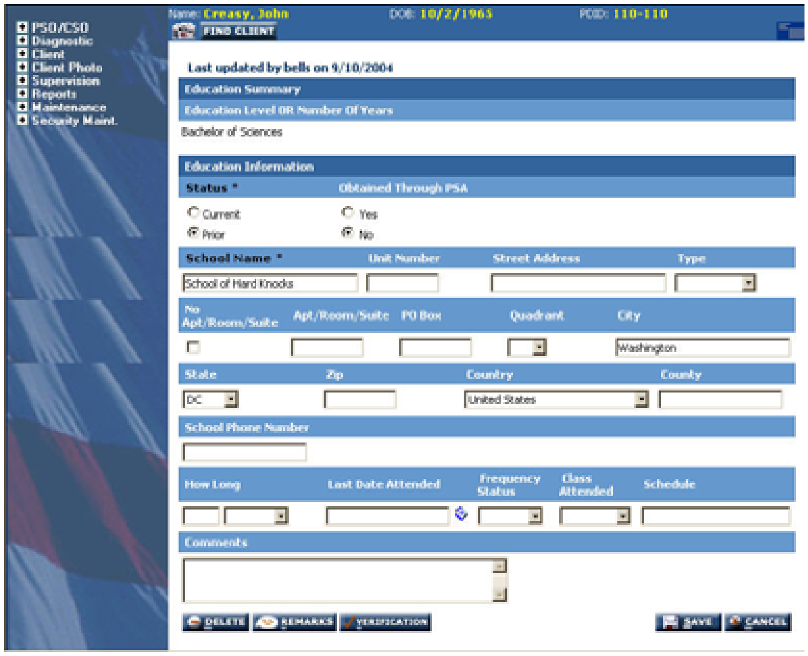
Education list

2 Select the client's education level from the Education Level dropdown list or record the number of years of education that the client has reported.

3 Click .

1.11.2 View Education Information

1. Perform the Find Client function and click on the **Education** module under the **Client** menu. The Education Summary form and Education list screen are displayed as illustrated above.
2. Click on any of the data displayed for the desired record to enter into the Education form screen. The Education form screen is displayed as illustrated below:

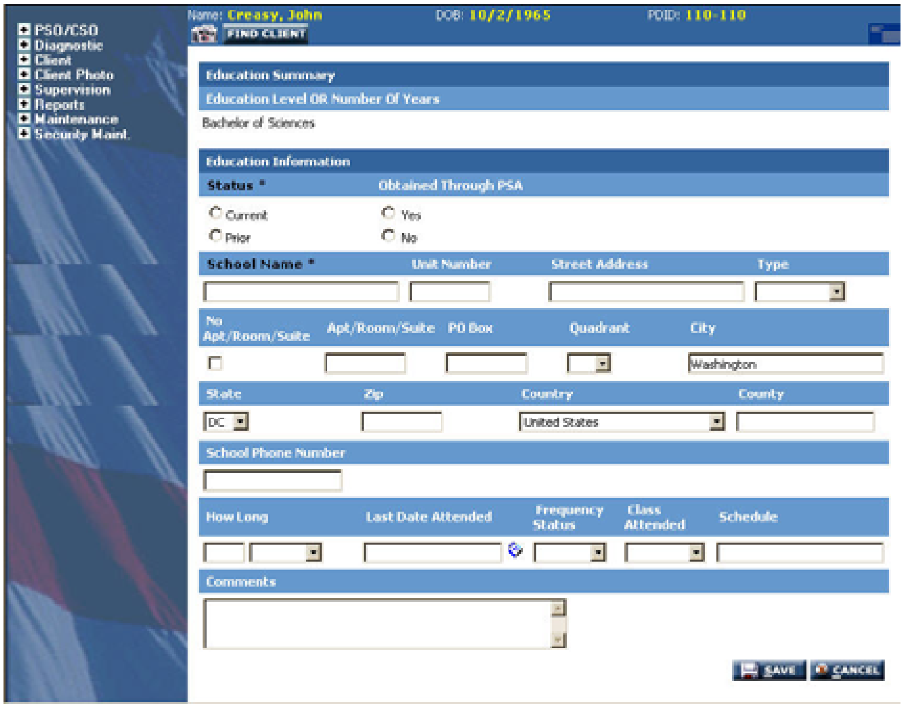


Education form

3. Click  to return to the Education Summary and Education list screen.

1.11.3 Add a New Education Record

1. Perform the Find Client function and click on the **Education** module under the **Client** menu. The Education Summary form and Education list screen are displayed as illustrated above.
2. Click on the  button. The Education form is displayed as illustrated below:



Education form

Note: When adding a new record altogether, users must first save the client's Education Summary information before being able to enter into the Education form.

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

3. Select Current or Prior Status.
4. If the education being added was obtained with the assistance of PSA, click on the 'Yes' Obtained Trough PSA radio button.
5. Record the name of the client's school in the School Name field.
6. Complete the remainder of the fields in form with the information provided by the client.

Note: The City, State, and Country fields default to the following: Washington, DC, and United States. If the user records a number in the School Phone Number field, PRISM formats the phone number automatically and correctly without the need to record parenthesis or hyphens.

7. Click SAVE. The Employment form screen is updated with the DELETE, REMARKS, and VERIFICATION buttons added to the screen.

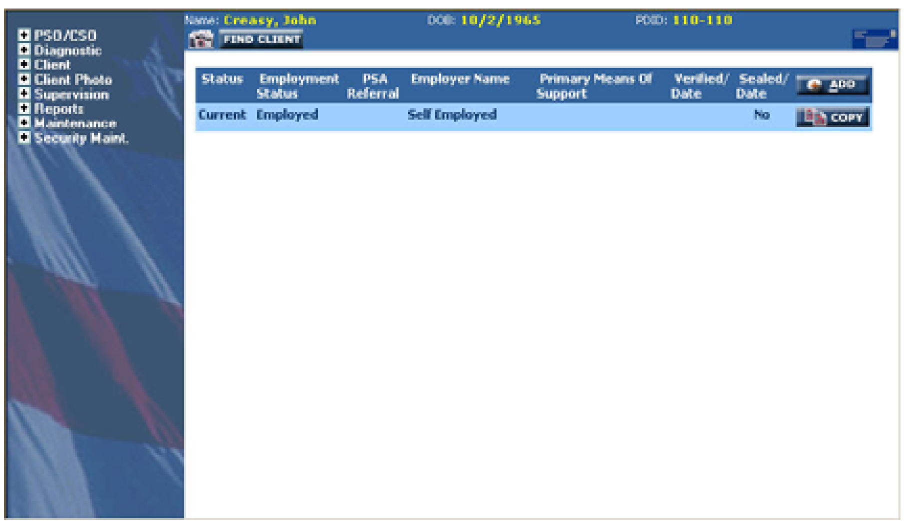
<u>1.12 Employment</u>

The **Employment** module is located under the **Client** menu.

Purpose: The purpose of the **Employment** module is to record and store a client's employment information and history.

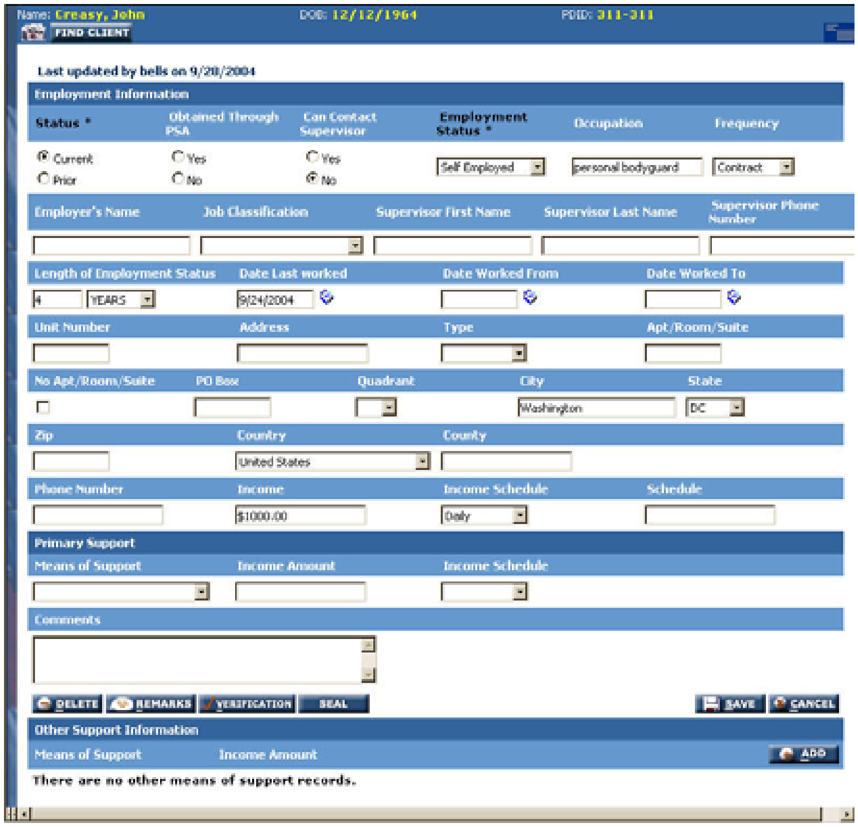
1.12.1 View Employment Information

1 Perform the Find Client function and click on the **Employment** module under the **Client** menu. The Employment list screen is displayed as illustrated below:



Employment list

2 Hyperlink on any of the data displayed for the desired record to enter into the Employment form screen. The Employment form screen is displayed as illustrated below:



Employment form

3 Click CANCEL to return to the Employment list screen.

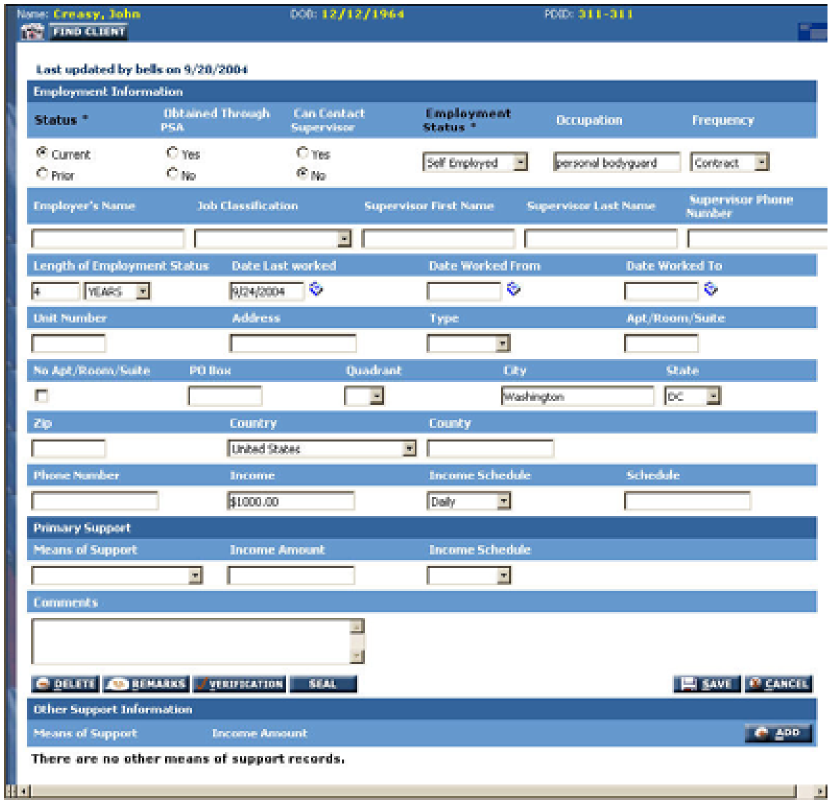
1.12.1.1 View Other Support Information

1. Perform the Find Client function and click on the **Employment** module on the **Client** menu. The Employment list screen is displayed as illustrated above.
2. Click on any of the data displayed for the desired record to enter into the Employment form screen. The Employment form screen is displayed as illustrated above.
3. Under the Other Support Information sub list, click on any of the data displayed for the desired record to enter into the Other Support Information form.

1.12.2 Add a New Employment Record

1. Perform the Find Client function and click on the **Employment** module on the **Client** menu. The Employment list screen is displayed as illustrated above.

2. Click on the  button. The Employment form is displayed as illustrated below:



Employment form

Note: Note that fields with **bold face type** and an ***** are mandatory fields and must be entered in order to save the information. Several business rules in this module may also prompt the user to record data in fields that are not denoted by the bold face type and *.

3. Select Current or Prior Status.
4. Click on the 'Yes' Obtained Through PSA radio button if the record being added was an employment obtained with assistance of PSA.
5. Click on Yes or No to indicate whether the client's employer may be contacted for reference purposes.
6. Select a status from the Employment Status dropdown list.
7. If employed, record the employment information in the remaining fields in the Employment Information form. Upon completion of those fields, proceed to step 10.

Note: The formatting requirement of the Income field is such that the user does not need to type in the $ symbol. Additionally, if the income amount is equal to a whole dollar amount

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(ex. $10.00 per hour), the user is not required to include the decimal point followed by two zeros. PRISM will automatically format the amount correctly.

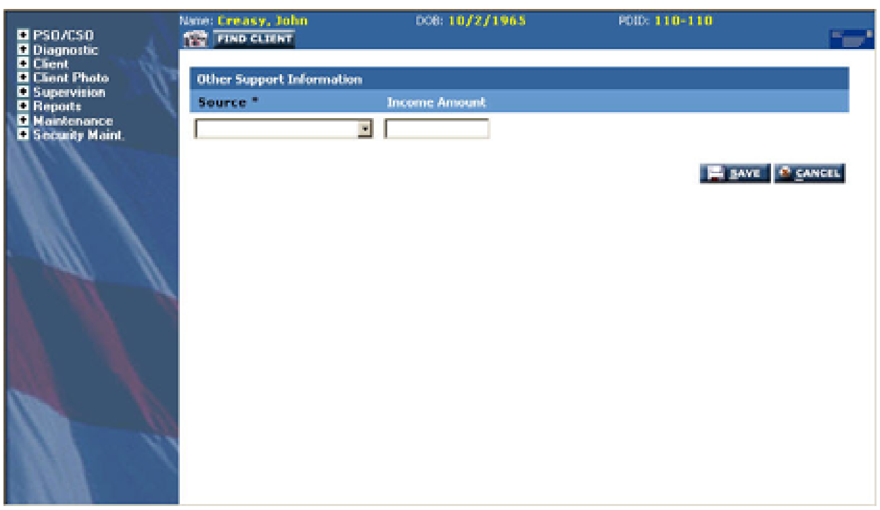
8. If the record being added has an Employment Status that's other than 'Employed' or 'Incarcerated', record the length of time in the Length of Employment Status field and proceed to the fields under the Primary Support section. If the client's Employment Status is homemaker, retired, or unemployed, users must select a means of support from the Means of Support dropdown list.

Note: If the client's Employment Status is 'Incarcerated', the record is not required to have a primary means of support selected.

9. Complete the fields under the Primary Support section.
10. Click . The Employment form screen is updated with the  and  buttons added to the screen.

1.12.2.1 Add Other Support Information to an Employment Record

1. Perform the Find Client function and click on the **Employment** module under the **Client** menu. The Employment list screen is displayed as illustrated above.
2. Hyperlink on any of the data displayed for the desired record to enter into the Employment form screen. The Employment form screen is displayed as illustrated previously.
3. On the Other Support Information sub list, click on the  button. The Other Support Information form is displayed as illustrated below:



Other Support form

4. Select the source of the other support information from the Support dropdown list.
5. Record the amount of income received from that support in the Income Amount field.
6. Click 

. The user is returned to the Education form screen and the newly added information is displayed under the Other Support Information sub list.

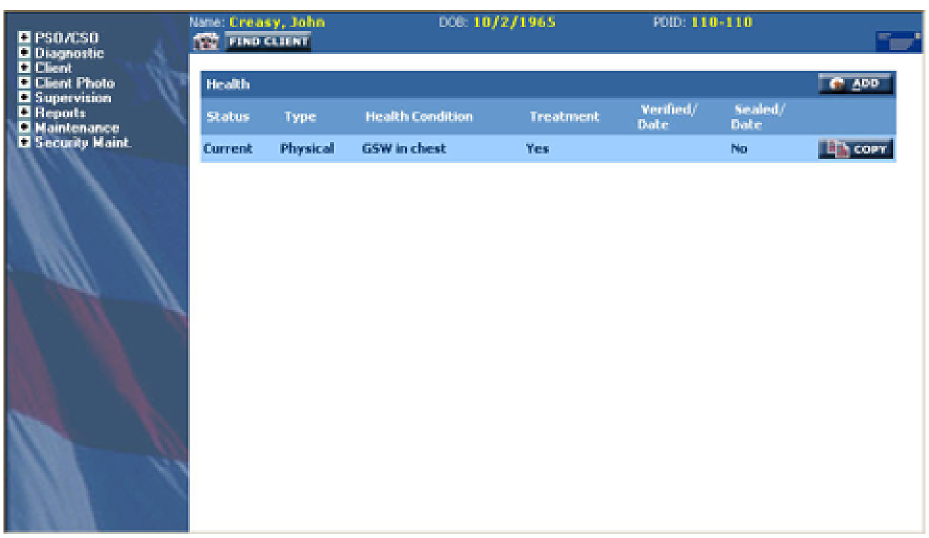
1.13 Health

The **Health** module is located under the **Client** menu.

Purpose: The purpose of the **Health** module is to record and store a client's health information and history.

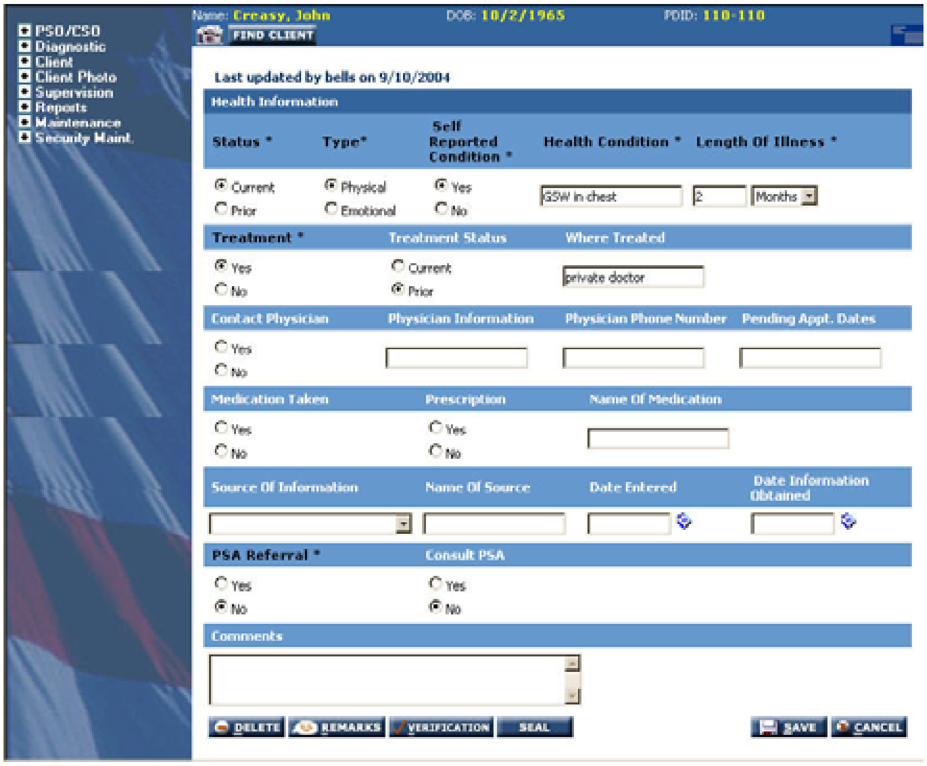
1.13.1 View Health Information

1 Perform the Find Client function and click on the **Health** module under the **Client** menu. The Health list screen is displayed as illustrated below:



Health list

2 Hyperlink on any of the data displayed for the desired record to enter into the Health form screen. The Health form screen is displayed as illustrated below:



Health form

3 Click CANCEL to return to the Health list screen.

1.13.2 Add a New Health Record

1. Perform the Find Client function and click on the **Health** module under the **Client** menu. The Health list screen is displayed as illustrated above.
2. Click on the ADD button. The Health form is displayed as illustrated below:

Health form

Note: Note that fields with **bold face type** and an ***** are mandatory fields and must be entered in order to save the information. Several business rules in this module may also prompt the user to record data in fields that are not denoted by the bold face type and *.

3. Select Current or Prior Status.
4. Select Physical or Emotional for the Type of condition.
5. If the client has reported the health condition, click on the ‘Yes’ Self Reported Condition radio button. If the health condition information was provided by other means, click on the ‘No’ Self Reported Condition radio button.
6. Record the name of the condition in the Health Condition field.
7. Record the length of the condition in the Length of Illness field.

Note: If ‘Life’ is selected from the Length of Illness dropdown, users are not required to record a numerical value in the other Length of Illness field.

8. Click on either the ‘Yes’ or ‘No’ Treatment buttons to indicate if the client is undergoing treatment for the condition.

Note: If the ‘Yes’ Treatment button is marked, users are required to select a Treatment Status radio button and fill in the Where Treated field.

9. Complete the remaining fields with the information provided by the client.

Note: If the 'Yes' Medication Taken button is selected, users must fill in the Name of Medication field.

Note: The PSA Referral radio buttons pertain to the question of whether PSA referred the client to treatment for the condition listed.

Note: The Consult PSA radio buttons pertain to the sensitivity of the condition listed. If the condition listed is sensitive in nature (i.e., HIV positive, cancer), users must click on the 'Yes' radio button for this field. By clicking on the 'Yes' button, any PSR generated will not list the health condition on the report and instead will contain a banner message directing the reader to consult with PSA for additional health information.

10. Click SAVE. The Substance Abuse form screen is updated with the DELETE, REMARKS, VERIFICATION, and SEAL buttons added to the screen.

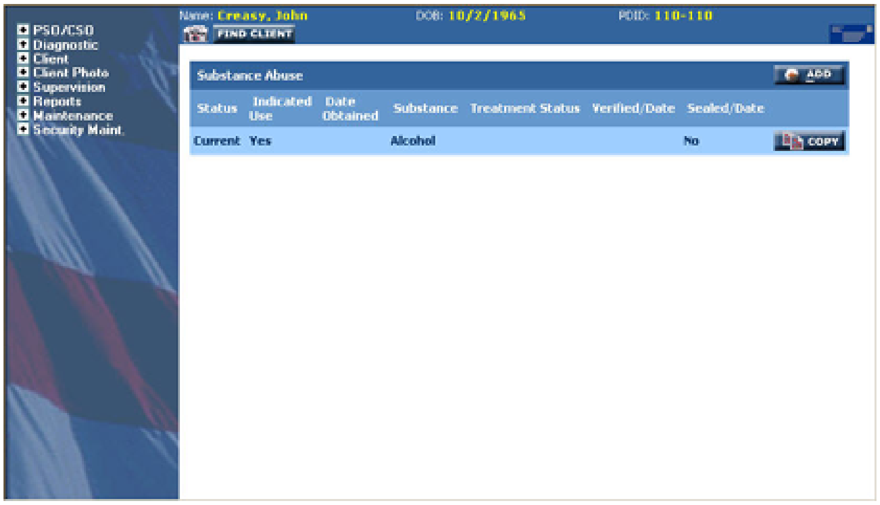
1.14 Substance Abuse

The **Substance Abuse** module is located under the **Client** menu.

Purpose: The purpose of the **Substance Abuse** module is to record and store a client's self-reported substance abuse history.

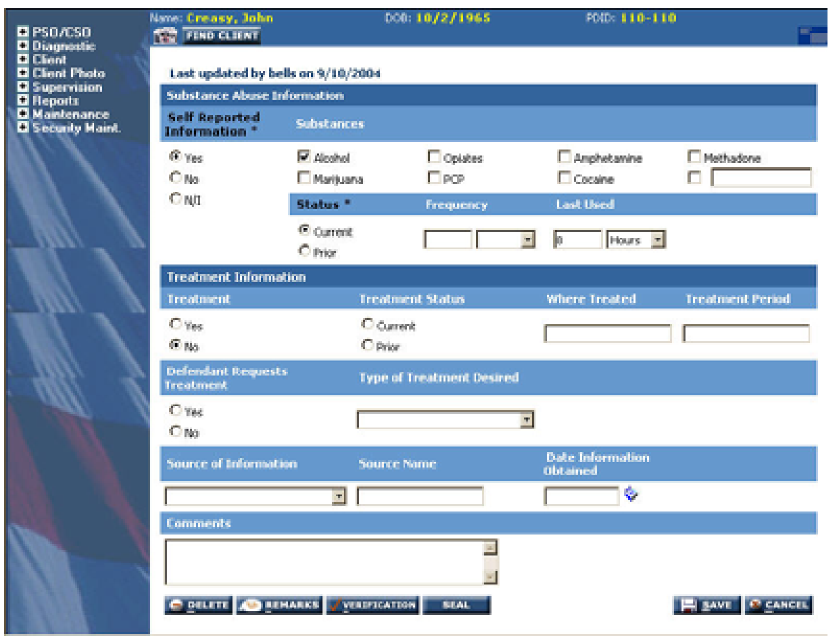
1.14.1 View Substance Abuse Information

1. Perform the Find Client function and click on the **Substance Abuse** module under the **Client** menu. The Substance Abuse list screen is displayed as illustrated below:



Substance Abuse list

2 Hyperlink on any of the data displayed for the desired record to enter into the Substance Abuse form screen. The Substance Abuse form is displayed as illustrated below:



Substance Abuse form

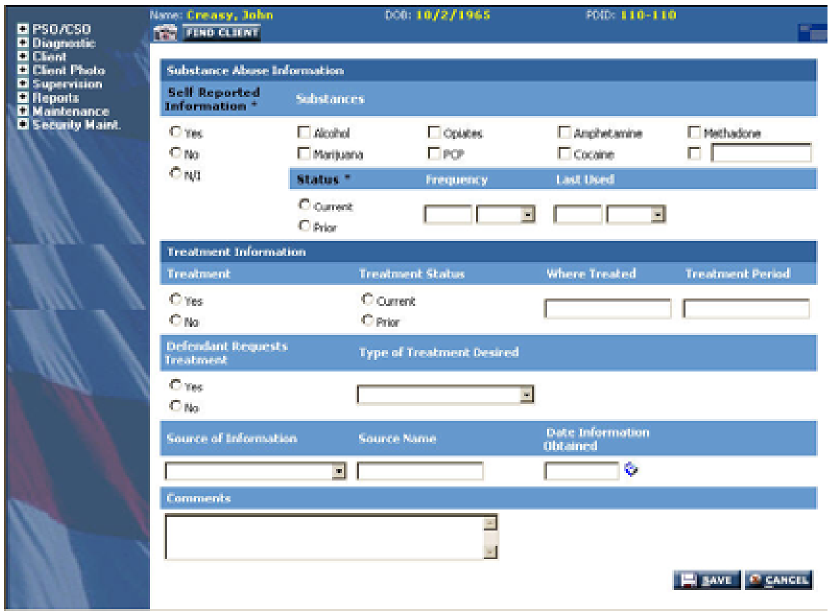
3 Click 

to return to the Substance Abuse list screen.

1.14.2 Add a New Substance Abuse Record

1. Perform the Find Client function and click on the **Substance Abuse** module under the **Client** menu. The Substance Abuse list screen is displayed as illustrated above.
2. Click on the 

button. The Substance Abuse form screen is displayed as illustrated below:



Substance Abuse form

Note: Note that fields with **bold face type** and an ***** are mandatory fields and must be entered in order to save the information. Several business rules in this module may also prompt the user to record data in fields that are not denoted by the bold face type and *.

3. Click on one of the Self Reported Information radio buttons to reflect the client's self-reported substance abuse information.

Note: By clicking on the 'Yes' radio button, the user is indicating that the client has reported using a substance. By clicking on the 'No' radio button, the user is indicating that self-reported substance use information was not obtained from the client. Clicking on the 'N/I' (None Indicated) radio button indicates that the client reported having never used any substances.

4. If the 'Yes' Self Reported Information button was marked, click on the checkboxes that correspond with the substances reported by the client. The blank text box may be used to record any substances not already displayed.

5. Click on one of the Status checkboxes to indicate if the client reported current or prior use of substances.
6. Record the Frequency and/or Last Used information as reported by the client.
7. Click on the 'Yes' or 'No' Treatment radio buttons.

Note: If the 'Yes' Treatment radio button is selected, users must select a Treatment Status, and fill in the Where Treated and Treatment Period fields.

8. Click SAVE. The Substance Abuse form screen is updated with the DELETE, REMARKS, VERIFICATION, and SEAL buttons added to the screen.

1.15 Associates

The **Associates** module is located under the **Client** menu.

Purpose: The purpose of the **Associates** module is to store information pertaining to clients' associates and references.

1.15.1 View Associate Information

1 Perform the Find Client function and click on the **Associates** module under the **Client** menu. The Associations list screen is displayed as illustrated below:

Associates list

2 Hyperlink on any of the data displayed for the desired associate to enter into the Associates Information form screen.

3 To view the Communications information for a given associate, click on any of the data displayed under the Communications sub list.

4 Click 

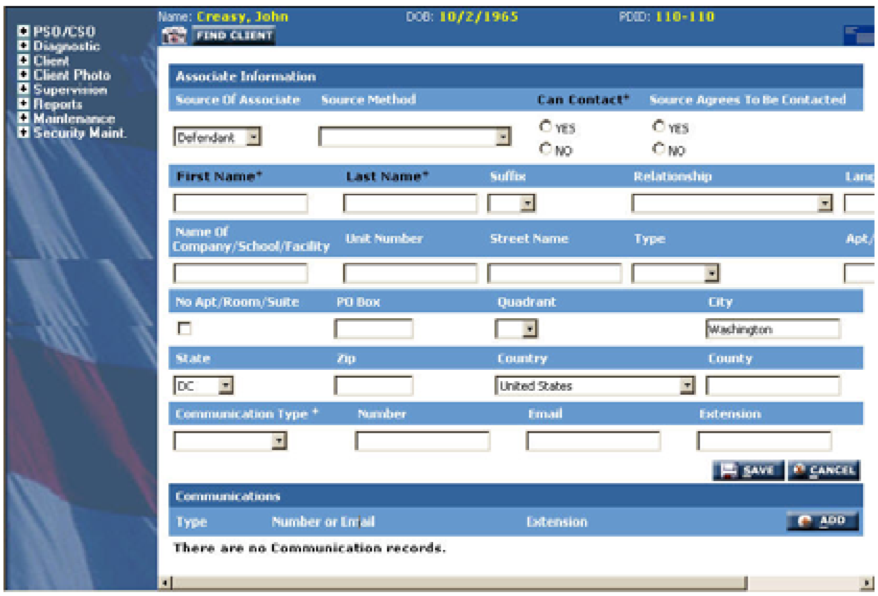
to return to the Associates list screen.

1.15.2 Add New Associate Information

1 Perform the Find Client function and click on the **Associates** module under the **Client** menu. The Associations list screen is displayed as illustrated above.

2 Click on the 

button. The Associates Information form is displayed as illustrated below:



Associates form

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

3 Select the source of the Associate information from the Source of Associate dropdown list. The default value in this field is Defendant.

4 Select the source method from the Source Method dropdown list.

5 Click on either the ‘Yes’ or ‘No’ Can Contact radio buttons to indicate whether the associate may be contacted for verification purposes.

6 If known, click on either the ‘Yes’ or ‘No’ Source Agrees To Be Contacted radio buttons to indicate if the associate agrees to be contacted for verification purposes.

7 Record the first and last name of the associate in the First Name and Last Name fields.

8 Record the remainder of the associate’s information in the fields provided.

Note: If the user records the associate's Communication Type and Number on the Associate Information form, that information will be added to the Communications form when the information is saved.

9 Click 

. The Associates Information form screen is updated with the 

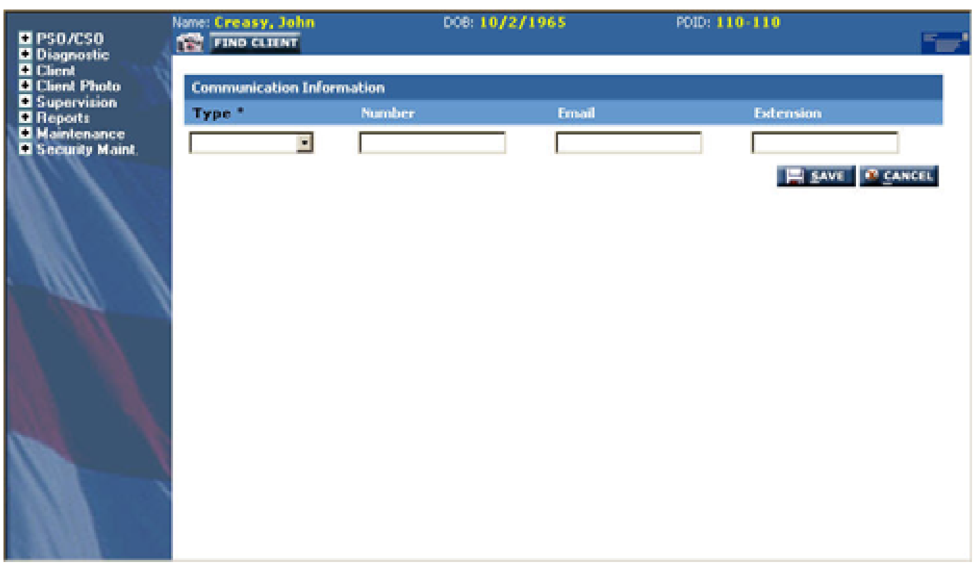
and 

buttons added to the screen.

1.15.2.1 Add Communications Information to an Associate

1. Perform the Find Client function and click on the **Associates** module under the **Client** menu. The Associations list screen is displayed as illustrated previously.
2. Hyperlink on any of the data displayed for the desired associate to enter into the Associates Information form screen.
3. Under the Communications sub list, click on the 

button. The Communications form is displayed as illustrated below:



Client Communications form

4. Select the type of communication from the Type dropdown list.

Note: If 'Email' is the Type of Communication selected, users may not fill in either the Number or Extension fields.

5. Record the communication information in the fields provided.

6. Click 

. The user is returned to the Associates Information form screen and the newly added information is displayed under the Communications sub list.

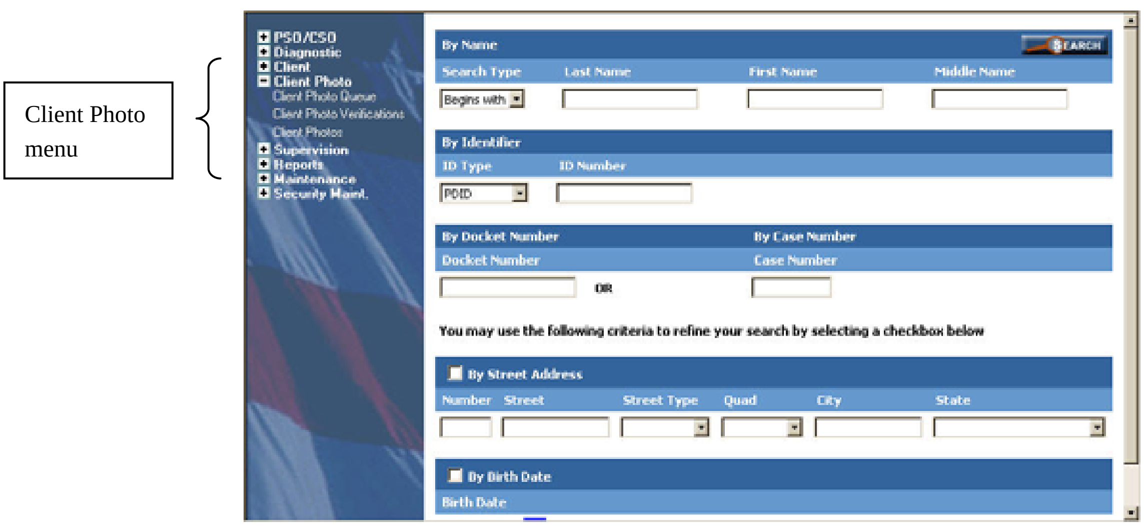
1.16 Criminal History

[Intentionally Removed – 04/22/2009dkc]

2.0 Client Photo

Purpose: The **Client Photo** menu permits users to record and store photographs of clients and is used by PSA in the identification process of clients reporting to the agency. As illustrated in the figure below, the **Client Photo** menu contains the following modules:

- Client Photo Queue
- Client Photo Verifications
- Client Photos



Client Photo menu

2.1 Client Photo Queue

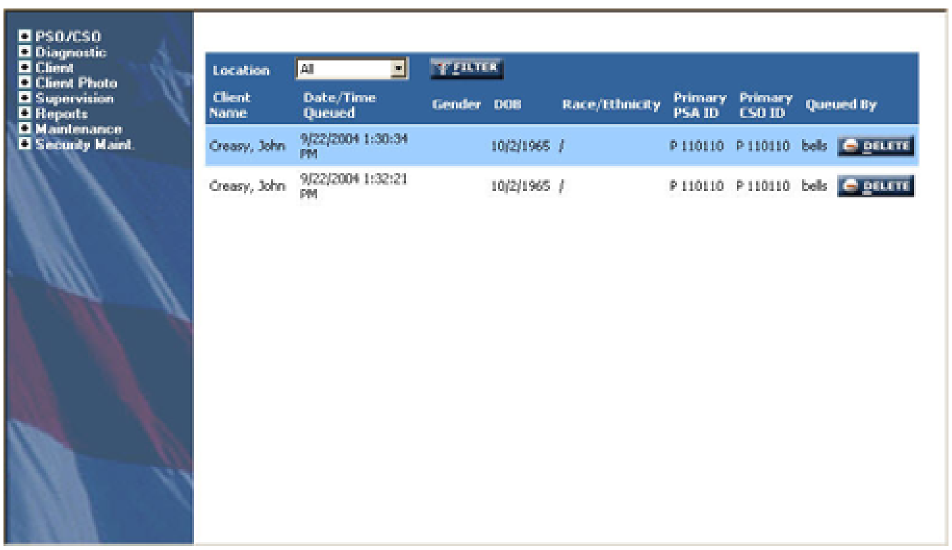
The **Client Photo Queue** module is located under the **Client Photo** menu.

Purpose: This module displays any clients who a case manager has requested that a new photograph taken. Clients who appear in the queue have been added through the **Client Photos** module by a user.

Note: Once a client's photo has been taken, his or her name is removed automatically from the queue.

2.1.1 View the Client Photo Queue

1. Click on the **Client Photo Queue** module under the Client Photo menu. The queue is displayed as illustrated below:



Client Photo Queue

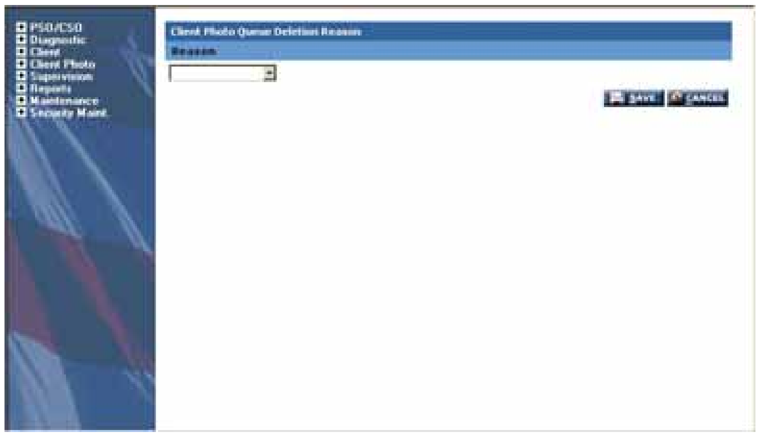
2. The list displayed will reflect all clients who are in the queue. To select a specific location where the user has requested the photo be taken, select the desired location and click on the 

button.

Note: Users may not add any clients to the queue in this module but may delete existing requests. To add a client to the queue, see section 2.3, Client Photos.

2.1.2 Delete an entry on the Client Photo Queue

1. Click on the DELETE button for the desired client. The user is transported to the Client Photo Queue Deletion Reason screen as illustrated below:



Client Photo Queue Deletion Reason

2. Select a reason for the deletion from the dropdown list.
3. Click on the SAVE button. A pop-up message is displayed requesting that the user confirm that the record is to be deleted. Click Ok. The user is returned to the Client Photo Queue.

<u>2.2 Client Photo Verifications</u>

The **Client Photo Verifications** module is located under the **Client Photo** menu.

Purpose: This module is used to record and store photo verifications of clients.

2.2.1 View Client Photo Verifications

1. Perform the Find Client function and click on the **Client Photo Verifications** under the **Client Photo** menu. The Photo Verification list is displayed as illustrated below:

Photo Verification list

1. Click on any of data displayed for the desired verification. The Client Photo form is displayed as illustrated below:

Client Photo form

2. Click  to return to the Photo Verification list.

2.2.2 Add a New Photo Verification

1. Perform the Find Client function and click on the **Client Photo Verifications** under the **Client Photo** menu. The Photo Verification list is displayed as illustrated above.
2. Click on the  button. The Client Photo form is displayed as illustrated below:

Client Photo form

3. Select a Verification Level from the dropdown list.
4. Record the Verification Date.
5. Select a Verification Method from the dropdown list.
6. Record any comments as needed.
7. Click . The user is returned to the Photo Verification list and the newly added verification is displayed.

2.3. Client Photos

The **Client Photos** module is located under the **Client Photo** menu.

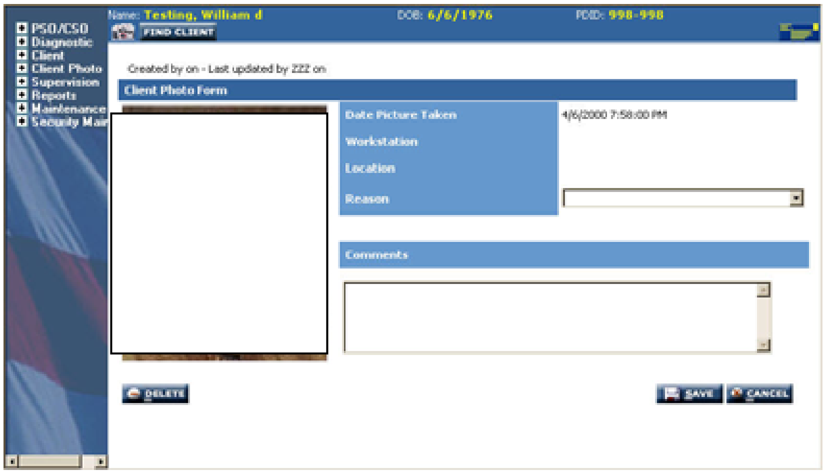
Purpose: The **Client Photos** module is used to store photographs of PSA clients and to add requests for a new photograph to be taken.

2.3.1 View Client Photos

1. Perform the Find Client function and click on the **Client Photos** module under the **Client Photo** menu. Any photos of the selected client currently in PRISM are displayed as illustrated below:

Client Photos

2. For specific details about each listing, click on an individual photo and the Client Photo form is displayed as illustrated below:

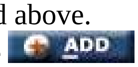


Client Photo form

3 Click  to return to the Client Photo screen.

2.3.2 Add a Request for a New Photo

1 Perform the Find Client function and click on the **Client Photos** module under the **Client Photo** menu. Any photos of the selected client currently in PRISM are displayed as illustrated above.

2 Click on the  button. The Client Photo form is displayed as illustrated below:

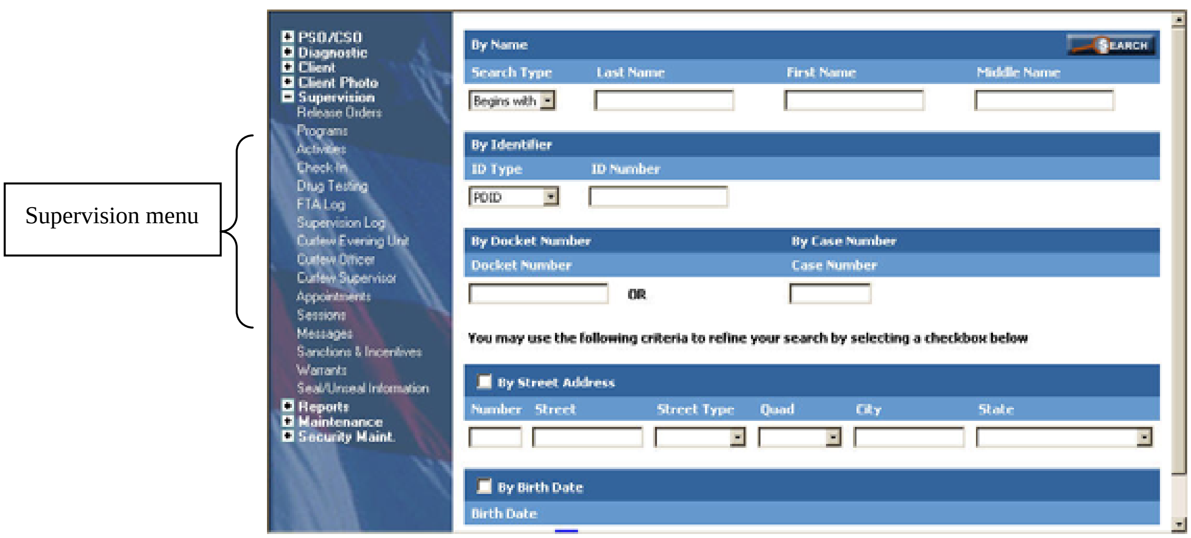
Client Photo form

3. Select the location where the photo is to be collected from the Location dropdown list.
4. Select a reason for the photo collection request.
5. Record any comments as needed.
6. Click .

3.0 Supervision

Purpose: The purpose of the **Supervision** menu is to record the supervisory activities for clients. As illustrated in the figure below, the **Supervision** menu contains the following modules:

- Release Orders
- Programs
- Activities
- Check-in
- Drug Testing
- FTA Log
- Supervision Log
- Curfew Evening Unit
- Curfew Officer
- Curfew Supervisor
- Appointments
- Sessions
- Messages
- Sanctions & Incentives
- Warrants
- Seal/Unseal Information



Supervision menu

3.1 Release Orders

The **Release Orders** module is located under the **Supervision** menu.

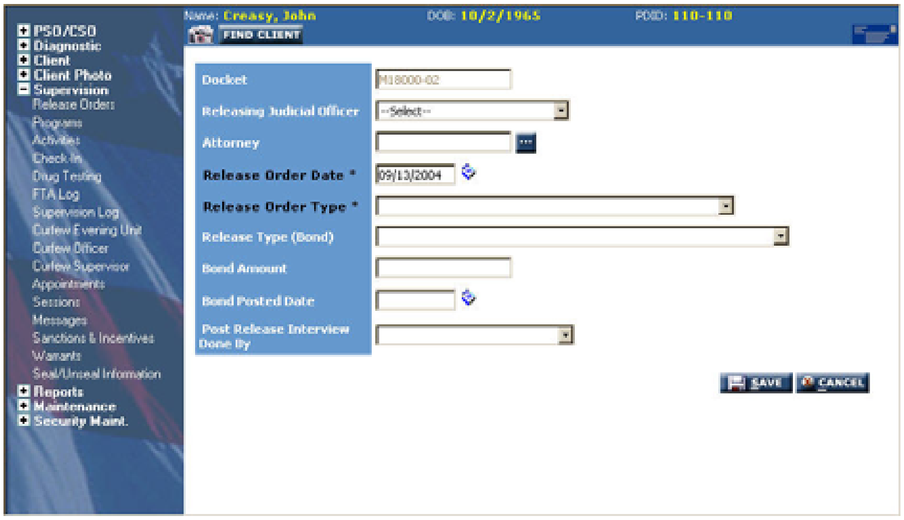
Purpose: This function is used to enter a release order and assign release conditions to the client's docket.

3.1.1 Add Release Orders

1. Perform the Find Client function and click on the **Release Order** module under the **Supervision** menu. The Release Order List is presented as illustrated in the figure below:

Release Order List

2. A list of all active court cases is displayed under the Pretrial function heading. The filter automatically defaults to Pretrial on the Release Order List screen.
3. Click on the  button for the appropriate court case. The Release Orders Form is presented as illustrated in the figure below:



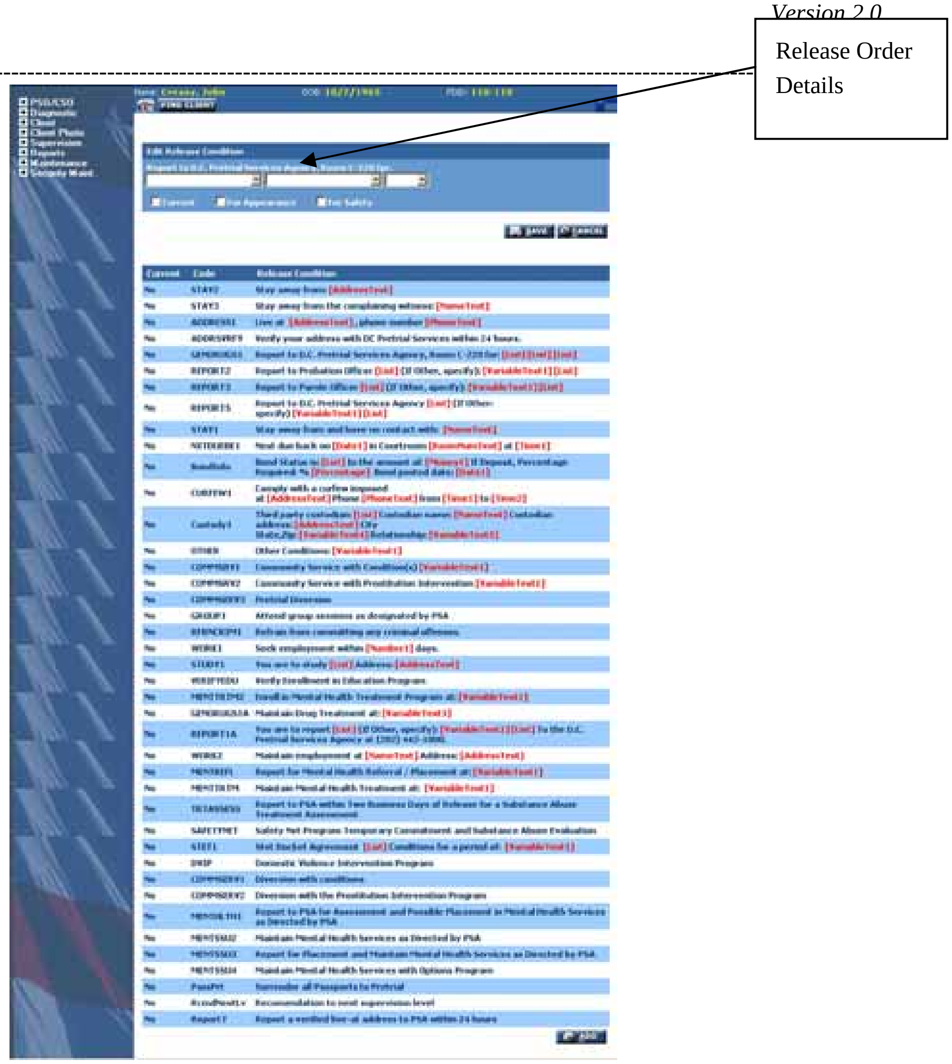
Release Orders Form

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

4. The docket number of the court case selected on the list screen should be pre-populated in the Docket field. If not, record it here.
5. Select the releasing judicial officer from the dropdown.
6. Enter the date of the release order the Release Order Date field. The Release Order Date field will default to the present date, but may be changed as needed.
7. Select the type of release order from the Release Order Type dropdown
8. Choose the release type from the Release Type (Bond) dropdown list.
9. If the release order type is financial, enter a numerical value into the Bond Amount field.
10. If known, enter the date on which the financial bond was posted.
11. If the PSO completing the post release interview is known, select the individual from the dropdown.
12. Click  . The Release Order Detail Form is presented as illustrated in the figure below:

Release Order Detail form

13. Select the appropriate release conditions on the detail form. The Release Order Detail form is presented as illustrated in the figure below:



Release Order Detail Form

14. All of the release conditions appropriate for this type of release order will appear on the bottom portion of the screen.
15. Each of the release conditions will be marked initially as Current = "No".
16. To make a release condition applicable to this release order, click on it and change the status from "No" to "Yes" by clicking on the Current Checkbox.
17. If the condition requires any customization (e.g. client curfew address and telephone number), a series of text fields and/or dropdown lists will be displayed. Make selections and entries as appropriate to save the condition with the customized portion. Any text in RED is customizable.

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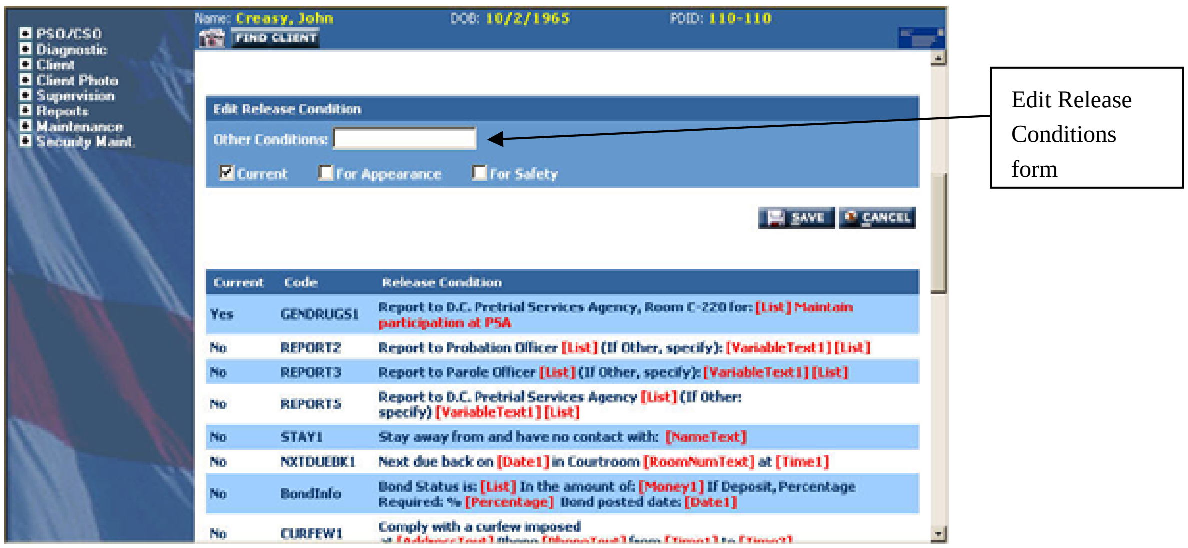
18. Click SAVE to enter the release condition on the release order. The Release Order Detail Form is refreshed with newly entered condition. The new customized variables will be in RED.
19. If a condition is not found on the list, click on the ADD button at the bottom of the screen. The Edit Release Conditions form is presented in the middle of the Release Order Detail form as illustrated in the figure below:



Edit Release Conditions form

20. Make entry in the Other Conditions field.
21. Click on appropriate box to indicate whether the condition is For Safety or For Appearance. The Current box will be checked automatically.
22. Click SAVE to enter the release condition on the release order. The Release Order Detail Form is refreshed with the new customized variable. The entered condition will be in RED as displayed in the figure below:

Release Order Condition in RED font.

Release Order Detail Form

Note: As the condition is turned on/activated, it will float to the top of the list of conditions. All current release conditions will be sorted to the top of the Release Condition List.

3.1.2 Amend a Release Order

Note: Use this if there is a need to add or remove a condition, and the release order type **does not** change.

1. Perform the Find Client function and click on the **Release Orders** module under the **Supervision Case** menu.
2. Choose the appropriate court case from the list by hyperlinking on it. The Release Order Detail Form is presented.
3. A list of all active court cases is displayed under the Pretrial function heading. The filter automatically defaults to Pretrial on the Release Order List screen.
4. Click on the 

 button on the appropriate court case. The Release Orders Form is presented.

Note: The Docket, and Release Order Type are not available for update.

5. Select the releasing judicial officer from the dropdown.
6. Enter the date of the release order the Release Order Date field. The Release Order Date field will default to the present date.
7. Select a release type from the dropdown in the Release Type field.

8. Click SAVE. The Release Order Detail Form is presented

Note: At least one value from the Release Order Detail form must be changed/updated to proceed forward and add/delete release conditions as desired.

9. At the bottom portion of the screen, all of the previously activated release conditions are listed in addition to all of the release conditions appropriate for this type of release order.
10. Select the conditions as required. To deactivate a previously selected condition, click on the condition and uncheck to Current Checkbox.
11. Click SAVE to either remove or add the release condition from the release order. The Release Order Detail form is refreshed with the newly selected or deselected release condition.
12. Click CANCEL to return to the Release Order List screen. The case that was amended will present a new release order with a current status with the previous version listed as amended as displayed in the figure below:

Release Orders List

3.1.3 Delete a Release Order

1. Perform the Find Client function and click on the **Release Orders** module under the **Supervision** menu.

---

2. Hyperlink on the Release Order to be deleted. The Release Order Detail form is displayed as illustrated below:

3. Click .

Note: A message is displayed stating, “Click Ok to confirm delete or Cancel”.

4. Click the OK button.
5. The Release Order list screen is presented with the deleted release order removed from the list.

3.2 Programs

The **Programs** module is located within the **Supervision** menu.

Purpose: The purpose of this function is to assign the client to the appropriate program.

Note: Before a Program can be added; a Court Case and a Release Order must be entered.

3.2.1 Add Program – Release Order

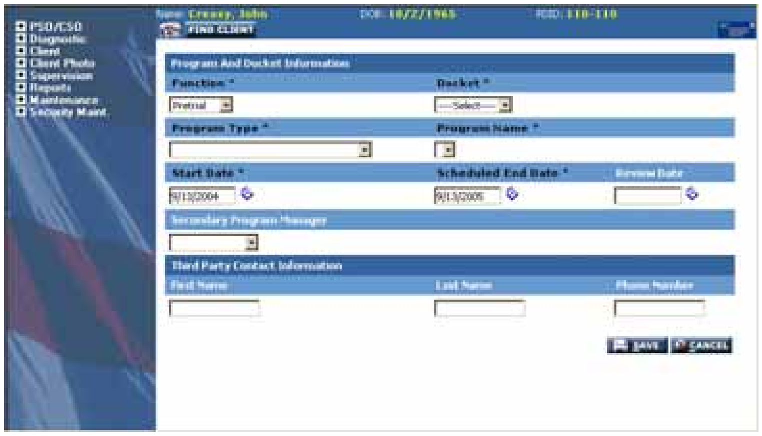
Note: Use this function to assign the client to an appropriate release program (GSU, ISP, etc.).

1. Perform the Find Client function and then click on the **Programs** module under the **Supervision** menu. The Program List screen is presented as illustrated in the figure below:

Program list

2. Click on the 

button. The Program and Activities Form is presented as illustrated in the figure below:



Program and Activities Form

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

3. Select Parole, Probation or Pretrial from the Function drop down menu. The default setting is Pretrial.
4. Select a docket number from the Docket dropdown.
5. Select the program type from the Program Type dropdown.

Note: The appropriate Program Names for the program selected will appear in the Program Names dropdown list.

6. Select the Program Name from the dropdown list.
7. Enter a Start Date.
8. Enter a Scheduled End Date.

Note: The default date in the Start Date field is the present date. The default date in the Scheduled End Date field is one year from the present date.

9. Enter the name of a Secondary Program Manager, if applicable (For example: If the client is being enrolled in HIDTA and you would like to capture the Treatment Officers name).
10. Add Third Party Contact Information, if applicable.
11. Click SAVE to return to the Program List. The program just added will appear in the Program List.

3.2.2 Add Program

Note: Use this function to assign the client to a release program or referral program. Release Programs are related to the Client's Release Order and carry the same name as the Release Order Type. Referral Programs refer to the hundreds of organizations a client might be referred to for treatment or counseling.

1. Perform the Find client function and click on the **Programs** module under the **Supervision** menu.
2. Click on the ADD button. The Program Form is presented as illustrated above
3. Select Parole, Probation or Pretrial from the Function drop down menu. The default setting is Pretrial.
4. Select a docket number from the Docket dropdown.
5. Select the Program Type from the dropdown list.

Note: For PSA purposes, the user will mainly choose PSA release order program or PSA referral order program.

6. The appropriate program names (the program that will be supervising the client) for the program type you selected will appear in the Program Names dropdown list.
7. Enter a Start Date.
8. Enter a Scheduled End Date.
9. Enter a name of a Secondary Program Manager if applicable.
10. Add Third Party Contact information, if applicable.
11. Click SAVE to return to the Program List. The program just added will appear on the list.

Note: Once a release order is added defining the program the client will be in, the user will choose programs associated with the release order. i.e. GSU (release order), GSU (release program), PSA (release or referral program), Program Name, Unit (program that will be supervising the client).

3.3 Activities

The **Activities** module can be located under the **Supervision** menu.

Purpose: The Activities function allows the user to assign the four client release order-related activities of check-ins, drug testing, curfew calls and sessions.

Note: The client MUST first be enrolled in a program before activities can be assigned. PRISM will not allow you to add an activity without a program. Each program has a default set of activities assigned to it.

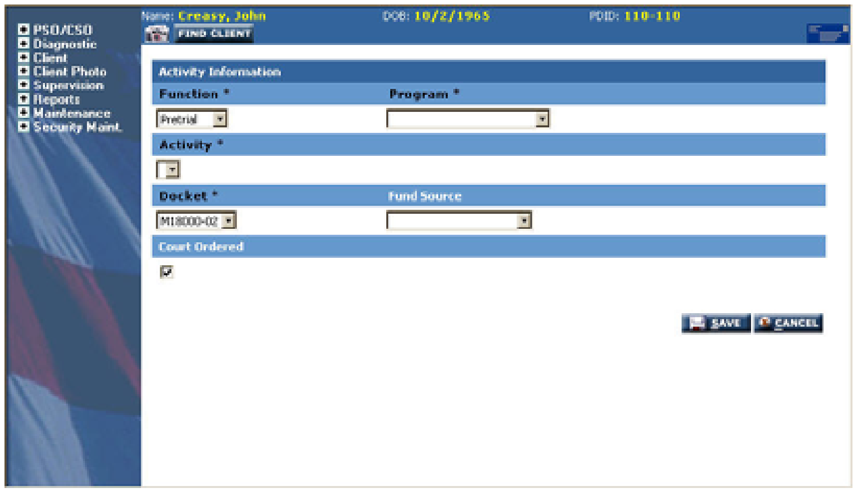
3.3.1 Add Activities

Note: Make sure client is enrolled in a program by clicking on the **Programs** module option under the **Supervision** menu. If the message states "There are no program records for this client", create a program. See Program Section 1.3 for instructions.

1. Perform the Find client function and click on the **Activities** module under the **Supervision** menu. The Activities screen is presented as illustrated in the figure below:

Activities Screen

2. The list of all the activities and related programs associated with your client are displayed. Click on the  button. The Activities form is presented as illustrated in the figure below:



Activities Form

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

1. Select Juvenile, Parole, Pretrial or Probation from the Function dropdown menu. The default value is Pretrial.
2. Select the program name from the Program dropdown menu.
3. Select the activity to be added from the Activity dropdown list.

Note: Only activities associated with the program selected will appear in dropdown.

4. Select the appropriate docket number this activity is associated to from the Docket dropdown list.

Note: All active docket numbers will appear in dropdown.

5. Select source from the Fund Source dropdown, if applicable to the activity you are choosing.
6. Click the Court Ordered checkbox if this is a court ordered activity.
7. Click  to return to the Activity list. The activity just added will appear on the list as illustrated in the figure below:

Activities List

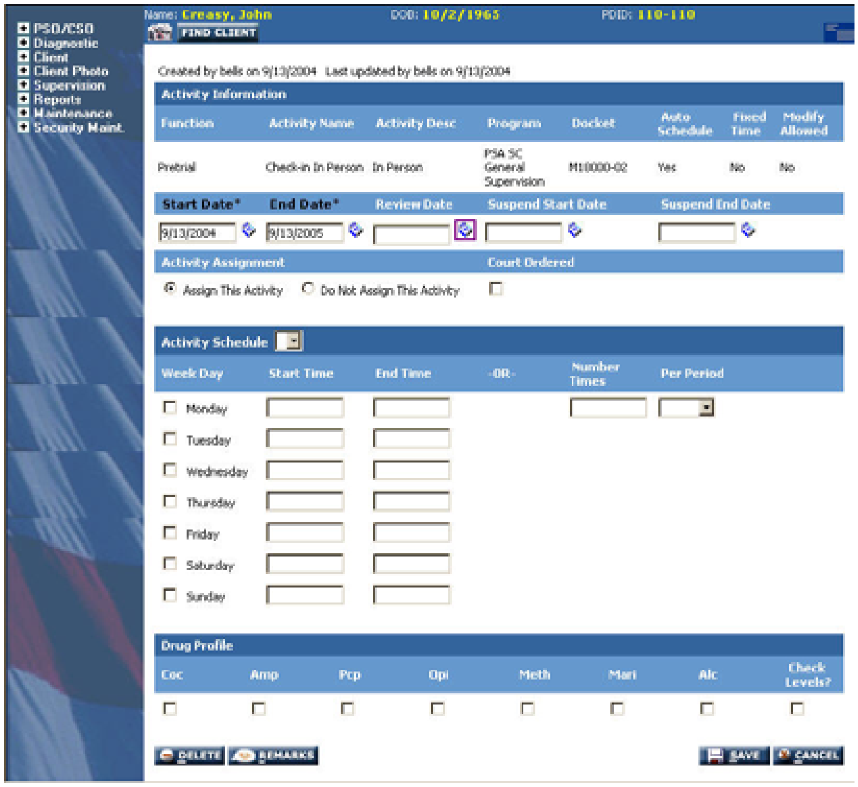
3.3.2 Assign Schedules to Activities

Note: This function is used to assign the proper schedule to the client's activities.

1. Perform the Find Client function and click on the **Activities** module under the **Supervision** menu.

Note: The activities to which the client is assigned are listed. The default schedule is also displayed. If the default schedule is correct, there is no need to modify the activity schedule.

2. Click on the activity. The Scheduling Form is presented as illustrated in the figure below:

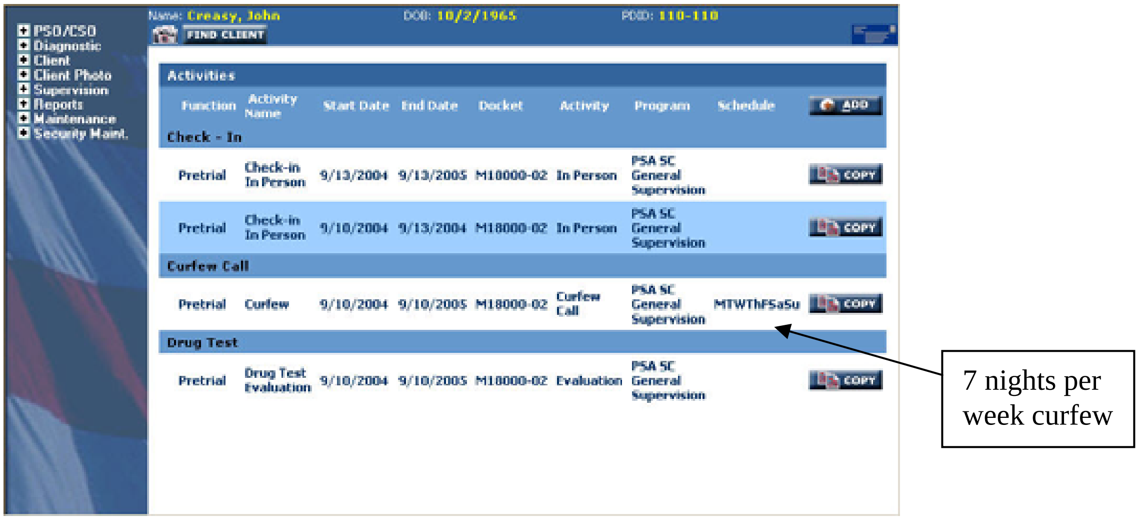


Schedule Form

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

3. The default schedule is presented. The default setting will have the "Assign this Activity" radio button marked.
4. Choose the activity schedule from Activity Schedule dropdown list.
5. Click on the appropriate week day check boxes and enter the Start and End time for the chosen days OR enter a number in the Number of Times field and choose an option from the Per Period dropdown.
6. Click 

. The Activities list is presented with the added schedule under the schedule column as illustrated in the figure below:



Activities List, Schedule Column

Note: The user may assign an activity by choosing a day and time of the week, OR number of times per day, week or month. For example, if the schedule of the activity is every Monday, Wednesday and Friday at 1:00pm, the schedule under the Schedule column in the Activities List will display "MWF". If the user schedules the activity for two times per day, the Schedule column will display "D2".

Note: Scheduling an activity automatically creates an expected Check-in for the defendant that the user will access and record ("satisfy") when the defendant complies.

3.4 Check-In

The **Check-In** module is located under the **Supervision** menu.

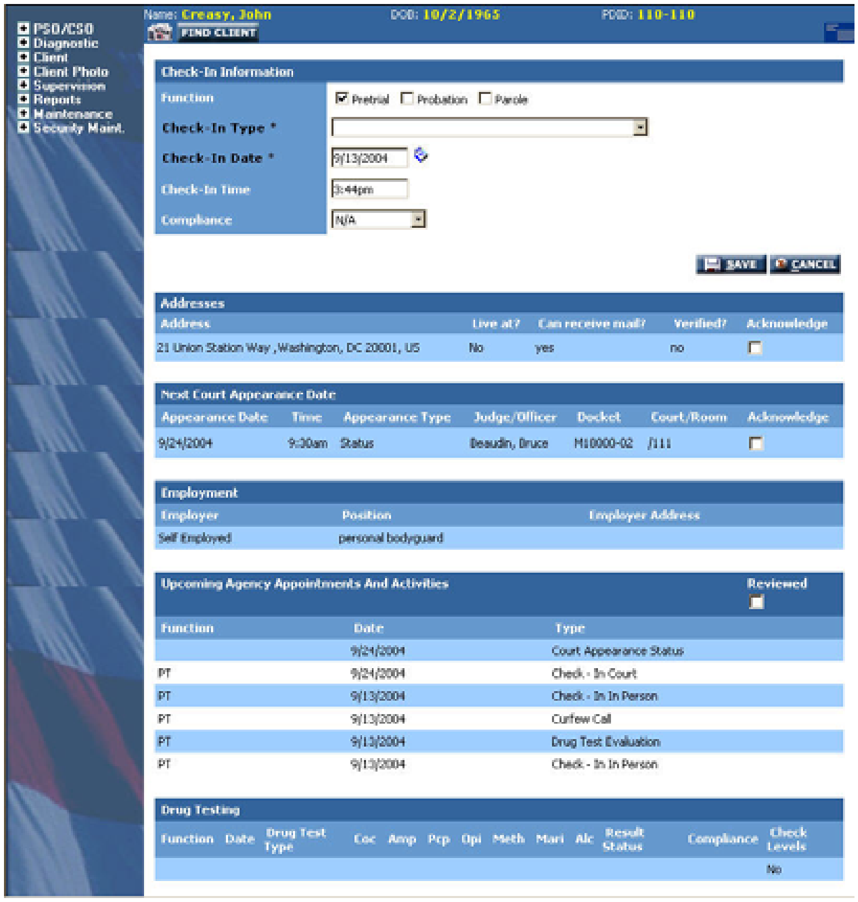
Purpose: This function will allow the user to check-in a client, or to schedule a spot drug test.

3.4.1 Add a Check – In

1. Perform the Find Client function and click on the **Check-In** module under the **Supervision** menu. The Check-In screen is presented listing all of the client's scheduled Check-ins as illustrated in the figure below:

Check-In Screen

2. To create a new unscheduled check-in, click on the  button. This will present the Check-In form as illustrated in the figure below:



Check-In Form

Note: If the defendant is reporting as required for an in-person check-in, drug test, or calling for a telephone check-in, you should look for that check-in on the Check-in list screen and hyperlink on that scheduled check-in to complete the function.

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

3. Select a Function. The default value that will be checked is Pretrial.
4. Choose the check-in type from the Check-In Type dropdown menu.
5. The date of the check-in is defaulted to the date the auto-scheduler created the check-in record. The scheduled check-in date can be over-written with the actual check-in date.

6. The time of the check-in is defaulted to the time the auto-scheduler created the check - in record. The scheduled check-in time can be over-written with the actual check-in time.
7. On the check-in form, there are several items, which must be used to process the check-in: Next court appearance date, Current address(es), and Current employment.
8. When completing a check –in, at least one acknowledgement check box must be populated.
9. Also displayed are all upcoming agency appointments. Any other check-ins scheduled for the coming week will appear on this list, and the client may be advised of any upcoming commitments.
10. To give the client credit for this check-in, choose "Yes" from the Compliance dropdown box. If the client is a Face-to-Face (FTF) check-in and/or must see his Case Manager to be given credit, the receptionist checking him in should simply check off the "ACKNOWLEDGED" boxes, but should not mark the client compliant. That way, in the event the client leaves after checking in with the receptionist and before seeing his case manager, he will NOT be given credit for a check-in.
11. After making updates to the form, click 

to return to the list.
12. If the check-in was marked compliant, it will now be noted on the list.
13. If the record was not marked compliant, any changes will be saved to the record (i.e., the receptionist checks off the "ACKNOWLEDGED" boxes), and will be visible the next time the record is opened.
14. If the client fulfills his check-in commitment, the record will be satisfied when the client is checked-in.
15. If the client does NOT fulfill his check-in commitment, the auto-scheduler will mark the client NON COMPLIANT at the time next week's check-in records are created.

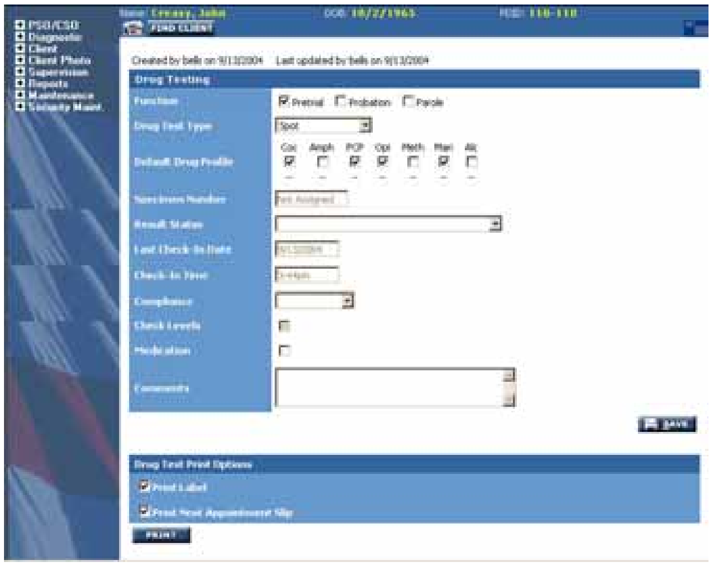
3.4.2 Check-Ins, Spot Drug Test

Note: Use this function to check-in the client, or to schedule spot drug tests. In order to create a spot drug test, the user must first create a check-in record, which will advise the drug unit to expect the client.

1. Perform the Find Client function and click on the **Check-In** module under the **Supervision** menu.
2. From the Check-In List, click on the 

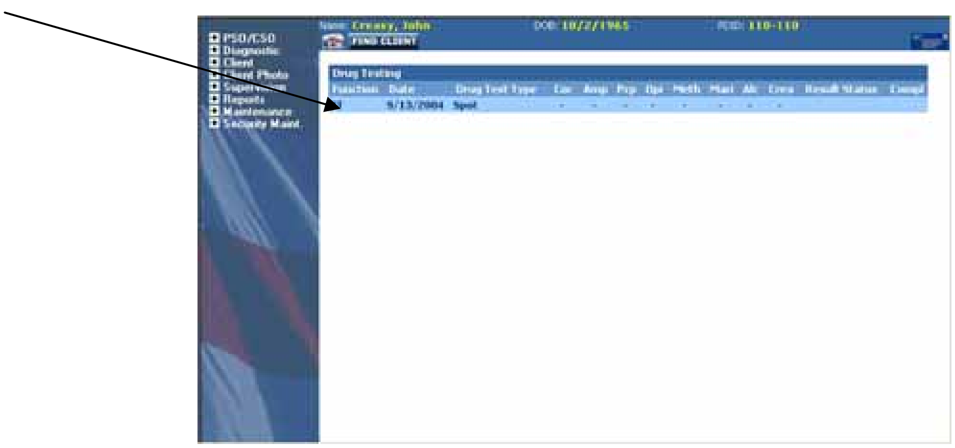
button to launch the Check-In Form.
3. Select the appropriate function (Pretrial, Probation, or Parole). The default value will be Pretrial.
4. Choose "Drug Test (Spot)" from the Check-In Type dropdown.
5. The date and time will default to the current time. Change if necessary.

6. Click on at least one acknowledgement box.
7. Choose “Yes” from Compliance check box.
8. Click SAVE. The Drug Testing form is presented as illustrated in the figure below:



Drug Test Form

9. Select Spot from Drug Test Type dropdown menu.
10. Blank out the Compliance field.
11. Click SAVE.
12. The Drug Testing Screen is presented with the entry displayed under the Drug Testing sub list as illustrated in the figure below:



Drug Testing Screen

Note: The Spot Test Check-In also creates a drug test record. To view the drug test portion of this function, click on the **Drug Testing** module under the **Supervision** menu to launch the Drug Test Form.

3.5 Drug Testing

The **Drug Testing** module is located under the **Supervision** menu.

Purpose: This function is used to view the results of previous drug tests, or to make changes to an upcoming pre-scheduled drug test. Drug tests will normally be scheduled automatically using the Activities function. Spot Drug Tests are scheduled by first creating a Drug Test Check-In.

3.5.1 View/Update Drug Testing

1. Perform the Find Client function and click on the **Drug Testing** module under the **Supervision** menu. The Drug Testing screen is presented as illustrated in the figure below:

Drug Testing Screen

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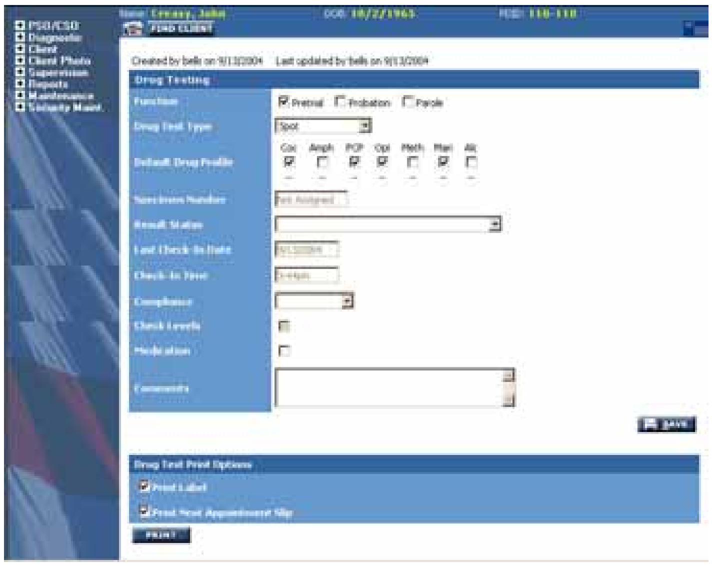
2. The Drug Testing screen will list both upcoming and completed drug tests, the drugs tested for (drug profile), and the results of those completed tests.
3. Click on a drug test record to view the details. After clicking on the record, the Drug Testing Form is presented as illustrated in the figure below:



Drug Testing Form

4. Choose the appropriate drug test type from the Drug Test Type dropdown.
5. Check the correct function, if not already checked.
6. The Default Drug Profile will be displayed, with check marks in the appropriate substance boxes.
7. The lab populates compliance once results become available. For example, if the test results are positive, the compliance should be "No".
8. Click 

 to return to the Drug Testing screen.

3.6 FTA (Failure to Appear) Log

The **FTA Log** module is located under the **Supervision** menu.

Purpose: This function is used to process FTA investigations or to view information about an FTA.

Note: To complete FTA and Bench Warrant Investigations, users should utilize the Bench Warrant Investigation section located in the **Criminal History** module under the **Client** menu.

3.6.1 Add New Entry

1. Perform the Find Client function and click on the **FTA Log** module under the **Supervision** menu. The FTA Log List is presented as illustrated in the figure below:

FTA Log List Screen

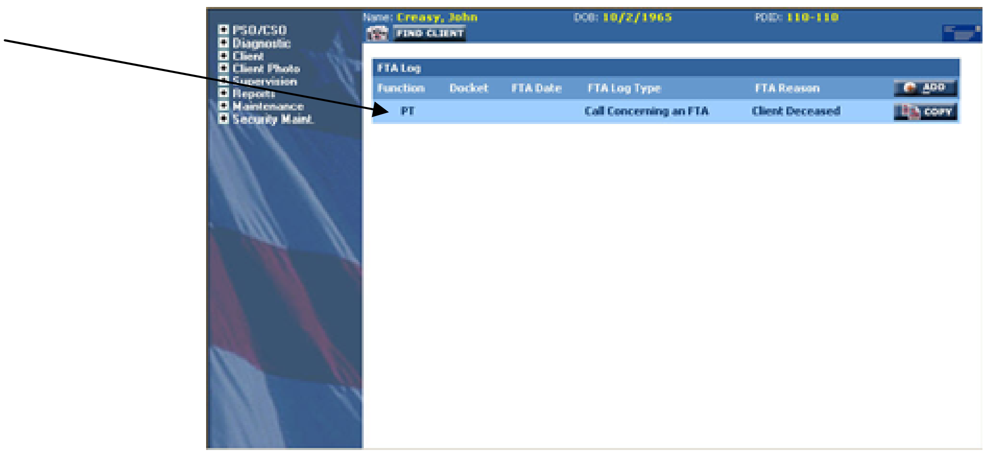
2. Click on the  button. The FTA Log Form is presented as illustrated in the figure below:

FTA Log Form

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

3. The Pretrial Function checkbox should be marked. If not, check it now.
4. Record the FTA Date and FTA Time in the fields provided.
5. Select a FTA Log Type from the dropdown provided.
6. Select the Docket Number and Appearance Date from the dropdown lists.
7. Select a FTA Reason from the dropdown list.
8. If as part of the investigation the Presiding Judge and courtroom are notified of the matter, click on the Court Notified checkbox.
9. If the court is notified, fill in the Notification Date, Notification Time, and Notification Method fields.
10. If a bench warrant is issued as a result of the client's failure to appear, mark the Bench Warrant Issued checkbox.
11. If the PSA Program to which the client is assigned has been notified, mark the Program Notified checkbox.
12. Record the name, the relationship to the client, and the phone number of the caller in the Source Recipient, Relationship to Client, and Callers Phone Number fields.

13. Record the date on which the investigation was started in the Investigation Start Date field.
14. When applicable, record the date when the investigation was finished in the Investigation End Date field.
15. Select a result from the Investigation Results dropdown.
16. Record any comments as needed in the Comments text box.
17. Click  after the information is entered. The FTA Log List screen is presented displaying the newly added information as illustrated in the figure below:



FTA Log List

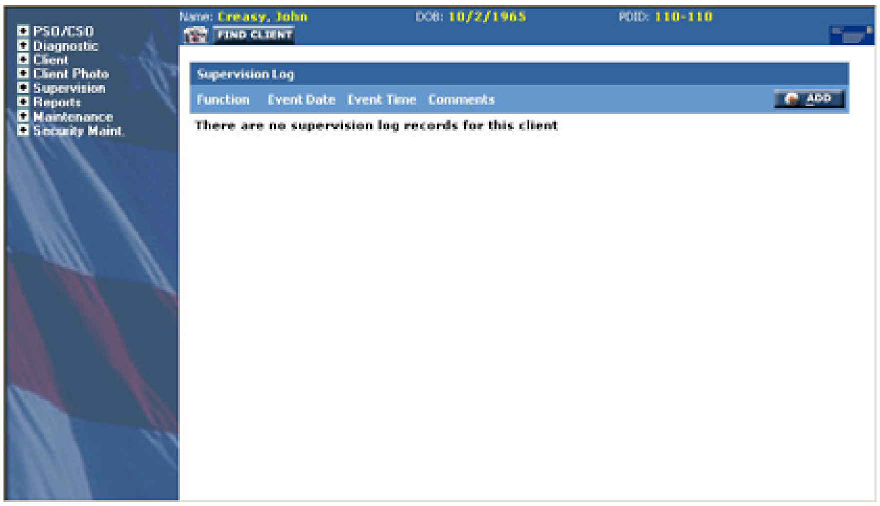
3.7 Supervision Log

The **Supervision Log** module is located under the **Supervision** menu.

Purpose: This function is used to enter Compliance, Drug Testing, Release Condition, Social Service, Supervisory Action, and Treatment information.

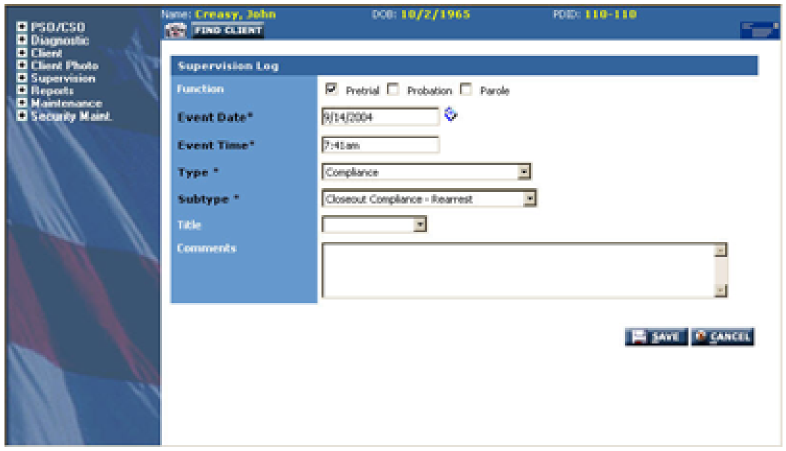
3.7.1 Add New Log Entry

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



Supervision Log Screen

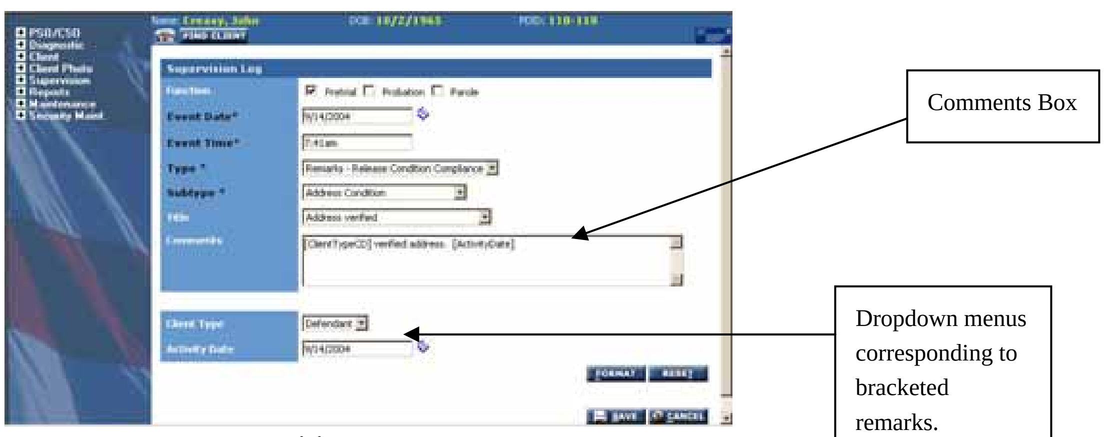
2. Click on the  button. The Supervision Log form is presented as illustrated in the figure below:



Supervision Log form

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

3. Check the correct Function check box. The default value is Pretrial.
4. The date and time of the event is defaulted to the present date and time. The Event Date and Event Time may be overwritten as needed.
5. Choose the type of log entry remark being entered from the Type dropdown.
6. Choose the sub-category of log entry remark form the Subtype dropdown.
7. Choose a title from the Title dropdown. When a title is selected, an unformatted remark will appear in the Comments box as illustrated in the figures below:



Supervision Log Form

8. Each [bracketed] remark has a corresponding box on the bottom portion of the screen.

9. Make an appropriate selection from one of the dropdown boxes on the bottom portion of the screen and click 

. The bracketed entry will be replaced by the dropdown choice.
10. You may change any part of the remark manually by clicking inside the Comments box and making appropriate changes.
11. When satisfied with the comments, click 

. The Supervision Log list is presented displaying the newly added entry.

3.8 Curfew Evening Unit

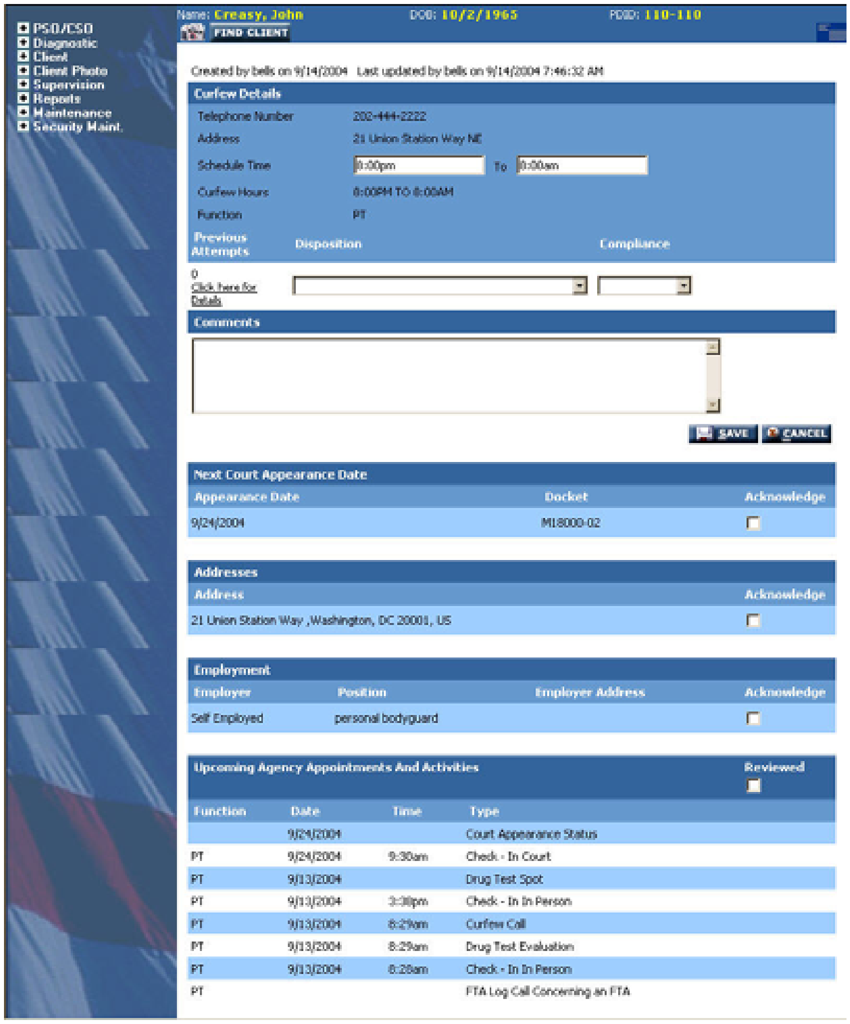
The **Curfew Evening Unit** module is located under the **Supervision** menu.

Purpose: The purpose of this function is to queue up the scheduled curfew calls for the particular PSO for the evening.

Note: A Client must have an active docket number with a current release order associated with it. The release order must contain a curfew condition with the correct curfew address and telephone number noted and that same address must be present in the **Addresses** module. The client must be enrolled in a PSA Release Program and have been assigned a Curfew Call activity. This function is designed for the Evening Unit.

3.8.1 Make a Curfew Call

1. Click on the **Curfew Evening Unit** module under the **Supervision** menu. The Officer Curfew Call Form is presented as illustrated in the figure below:



Officer Curfew Call Form

2. The Client's name will appear in the header record.
3. The curfew details box contains the telephone number at the curfew address, the curfew address itself, the curfew period, and the function (what Agency is supervising the client) to which this curfew call applies.
4. If the current time is earlier than the curfew start time, the evening officer would make NO ENTRIES on the screen and click 

 to advance to the next call in queue.
5. To process the call, choose the appropriate disposition from the Disposition dropdown.
6. The curfew caller will ONLY choose from the Compliance dropdown (YES, NO, N/A) if he/she plans to complete the call.

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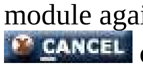
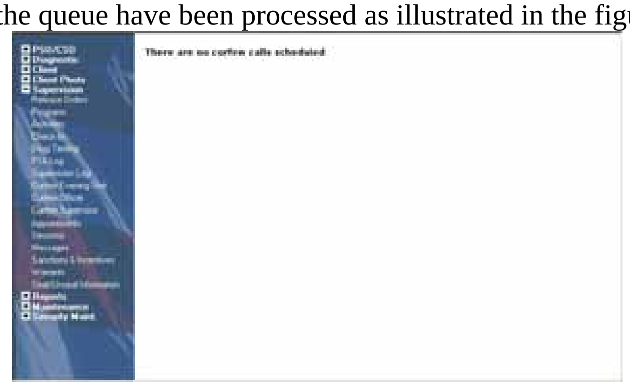
a. The caller will choose COMPLIANCE = YES, if he/she has verified the client is at home.
b. The caller will choose COMPLIANCE = NO, if the client is not home and the curfew start time has passed.
c. COMPLIANCE = N/A should not be chosen for this screen.
d. Click  to complete the call and remove it from the queue.

7. If the caller gets a busy signal and wants to put the client back into the queue, the user would choose the appropriate response (LINE BUSY) from the dropdown, click , and the call will be returned to the queue.

Note: When the caller wishes to place the client back into the queue as explained above, he/she must not select a compliance for the entry. To do so would result in the removal of the call from the queue.

8. If the caller re-processes a call, he/she can learn the disposition(s) of the other call(s) by clicking on the CLICK HERE FOR DETAILS area. All of the previous dispositions of the call will be displayed.
9. The caller may enter any appropriate comments regarding the call in the Comments box.
10. PRISM will display the next court appearance date, the client's current address and employer, and any upcoming agency appointments (including check - ins and drug tests) – the caller should use this information to verify the identity of the client.
11. If this information is not sufficient for verification purposes, the caller may leave this screen and check any other screen – he/she is now operating in the context of one client.
12. To return to the client the caller was processing, click on the **Curfew Evening Unit** module again - that entry will remain on the caller's machine until the caller has clicked  or .
13. Callers will see a message "THERE ARE NO CURFEW CALLS SCHEDULED" when all calls in the queue have been processed as illustrated in the figure below:



Officer Curfew Call Form

3.9 Curfew Officer

The **Curfew Officer** module is located under the **Supervision** menu.

Purpose: The Curfew Officer screen will allow the user to view the curfew call list and the compliance status of the calls. Users may also assign additional curfew call using this module as well as complete previously scheduled calls.

3.9.1 Assign Curfew Call

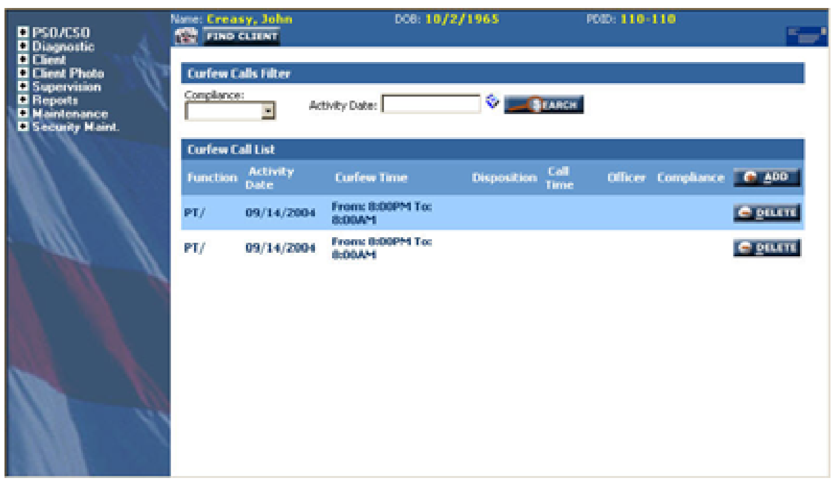
1. Perform the Find Client function and click on the **Curfew Officer** module under the **Supervision** menu. The Curfew Call List is presented as illustrated in the figure below:

Curfew Calls List

2. Click on the  button. The Curfew Calls Screen with the title "Click on Record to Schedule a Curfew Call for the Client" appears as illustrated in the figure below:

Curfew Calls Screen

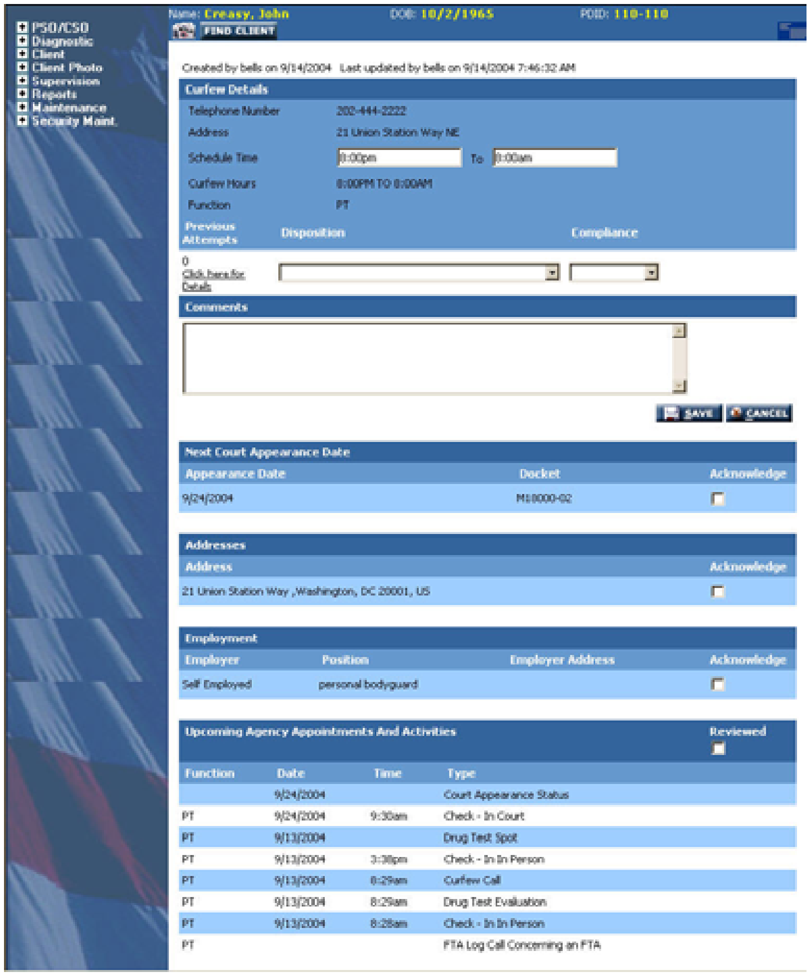
3 Hyperlink on a client's record. The Curfew Call List is presented and the curfew call is displayed among the list as illustrated in the figure below:



Curfew Calls List

3.9.2 Make a Curfew Call

1. Perform the Find Client function and click on the **Curfew Officer** module on the **Supervision** menu. The Curfew Call List is presented.
2. Click on a scheduled curfew call from the list. The Officer Curfew Call Form is presented as illustrated in the figure below:



Officer Curfew Call Form

3. Complete the call to the client, and then select a disposition from the Disposition dropdown.
4. Select a compliance from the Compliance dropdown.
5. Enter your comments, if any, in the Comments field.
6. Click . The Curfew Call list is presented and the Disposition and Compliance of the call just made are displayed.

<u>3.10 Curfew Supervisor</u>

The **Curfew Supervisor** module is located under the **Supervision** menu.

Purpose: The Curfew Supervisor screen allows the Supervisor to view all of the scheduled curfew calls, make a curfew call and to force add a curfew call. Only the Curfew Supervisor designee will have access to this function.

3.10.1 View Curfew Calls

1. Perform the Find Client function and click on the **Curfew Supervisor** module under the **Supervision** menu. The Supervisor Curfew Call List is presented displaying all of the curfew calls scheduled for that day as illustrated in the figure below:

Supervisor Curfew Call List

Note: The Curfew Supervisor List displays ALL of the scheduled curfew calls. Although you may have initially selected a particular client while working with the application, note that once in the Curfew Supervisor List screen, the names of ALL of the clients with a scheduled curfew call will appear.

3.10.2 Make a Curfew Call

1. Click on the **Curfew Supervisor** module under the **Supervision** menu. The Supervisor Curfew Call List is presented displaying all of the curfew calls scheduled for that day.

2. Click on a scheduled curfew call from the list. The Officer Curfew Call Form is presented as illustrated in the figure above.
3. Select a disposition from the Disposition dropdown.
4. Select a compliance from the Compliance dropdown.
5. Enter comments, if any, in the Comments field.
6. Click 

. The Supervisor Curfew Call List is presented and the curfew call is removed from the list.

3.10.3 Add a New Curfew Call

1. Click on the **Curfew Supervisor** module under the **Supervision** menu. The Supervisor Curfew Call List is presented displaying all of the curfew calls scheduled for that day as illustrated in the figure below:

Supervisor Curfew Call List

2. Click on the 

button. The Supervisor Curfew Call List Form is presented as illustrated in the figure below:

Supervisor Curfew Call List Form

3. To search for a client by PDID, click on the PDID button and enter the client's PDID number in the appropriate field.
4. To search by Last Name, click on the Last Name button and enter the Client's Last Name in the appropriate field.
5. Click 

.
6. A list of clients meeting the criterion (a) entered will be presented as illustrated in the figure below:

Supervisor Curfew Call List

7. Hyperlink on the appropriate client to schedule a call.
8. The Supervisor Curfew Call List is presented and the new curfew call is displayed as the first entry on the list.

3.11 Appointments

The **Appointments** module is located under the **Supervision** menu.

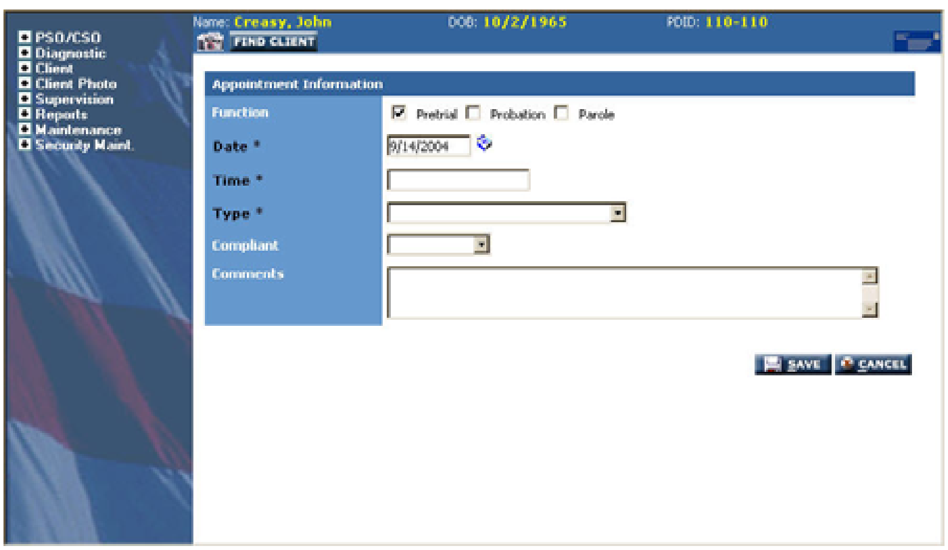
Purpose: This function will allow the user to view a list of all the client's appointments, with a capacity of 100.

3.11.1 Add New Appointments

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

Appointments Screen

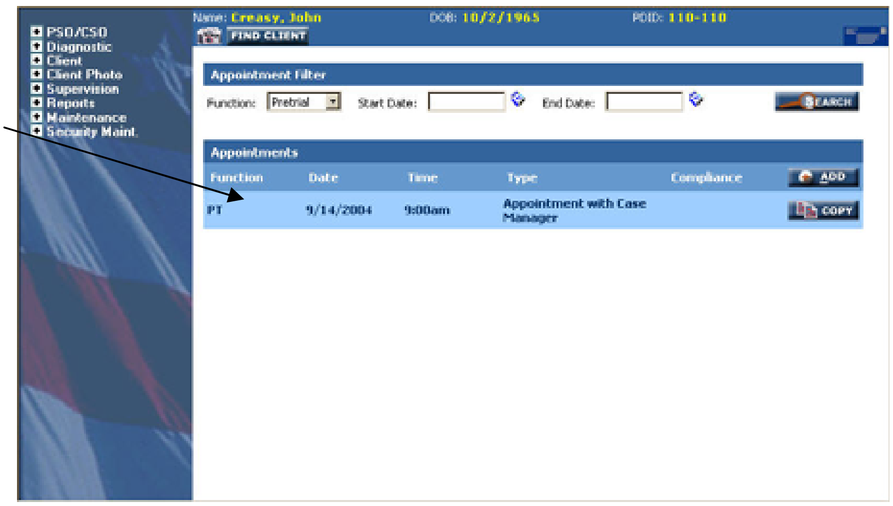
2. Click on the  button under the Appointment sub list. The Appointment form is presented as illustrated in the figure below:



Appointment Form

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

3. Click the appropriate function box. The default value for the field is Pretrial.
4. Today's date is auto-populated in the Date field by default.
5. Record the time of the appointment in the Time field.
6. Select type from the Type dropdown list.
7. Select a value from the Compliant dropdown.
8. If there are comments, add them to the Comments field.
9. Click . The Appointment screen is presented with the new appointment under the Appointment sub list as illustrated in the figure below:



Appointments Screen

3.11.2 Appointment Filter

The appointment filter is used to view client appointments with certain criteria.

1. Perform the Find Client function and click on the **Appointments** module on the **Supervision** menu. The Appointment screen is presented as illustrated in the figure below:

Filter Function

Add Filter Screen

2. Select the appropriate function from the dropdown menu. The default value in the dropdown is Pretrial.
3. Record a date in the Start Date field.
4. Record a date in the End date field.
5. Click . The appointments matching the selected criteria in the filter section are presented in the bottom half of the screen under the Appointments sub list as illustrated in the figure above.

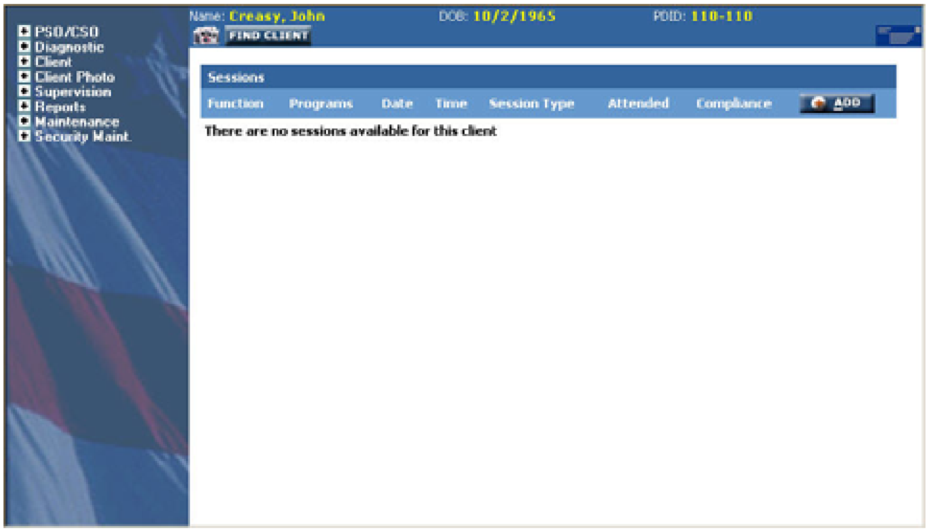
3.12 Sessions

The **Sessions** module is located under the **Supervision** menu.

Purpose: This function is used to schedule a client for sessions such as Alcoholics or Narcotics Anonymous, or any type of session for which compliance is being measured.

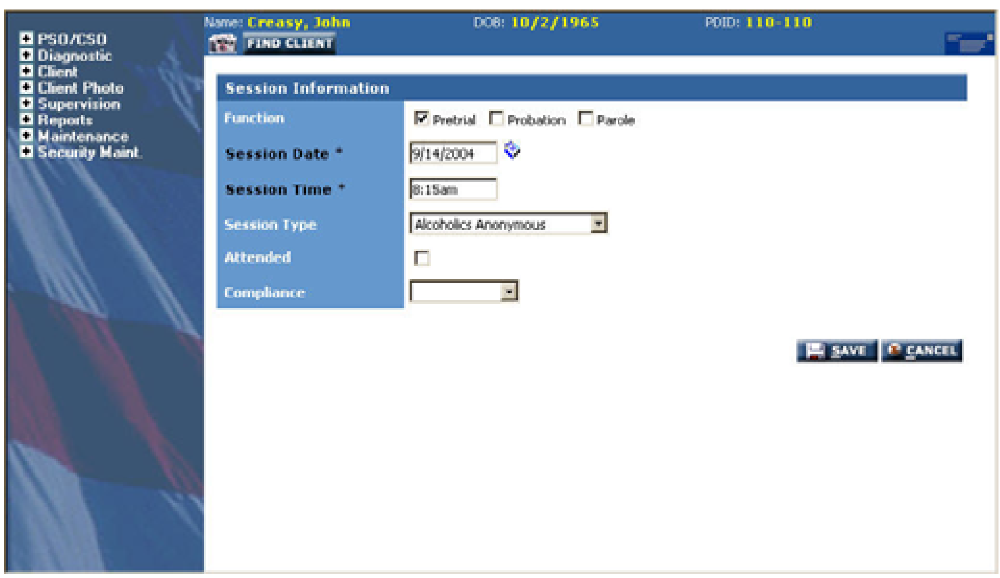
3.12.1 Add Session

1. Perform the Find Client function and click on the **Sessions** module under the **Supervision** menu. The Sessions List is presented as illustrated in the figure below:



Sessions List

3. Click on the  button. The Sessions Form is presented as illustrated in the figure below:



Sessions Form

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

4. Click on the appropriate Function. The default value is Pretrial.
5. Enter a date in the Session Date field. The default value will be the current day.
6. Enter a time in the Session Time field. The default value will be the current time.
7. Select type from the Session Type dropdown.
8. Check the Attended check box.
9. Select compliance from Compliance dropdown.
10. Click 

. The Sessions List is presented with newly added session displayed in list.

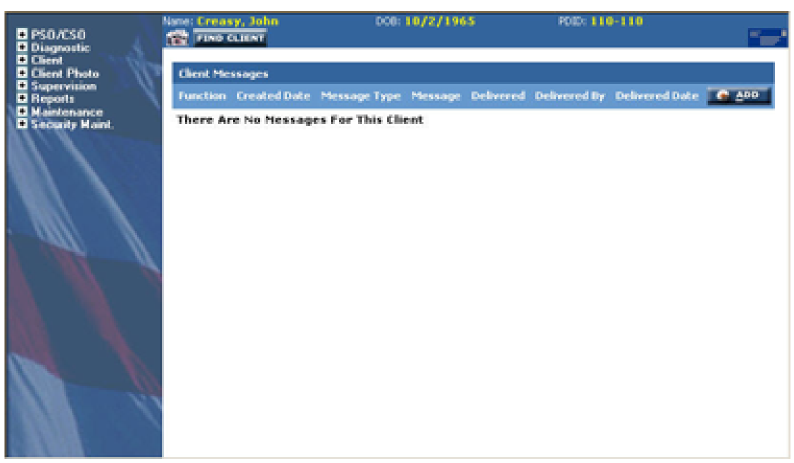
3.13 Message

The **Message** module is located under the **Supervision** menu.

Purpose: This function is used to enter and view messages for or about the client. Once the message is viewed and the client is notified of the message, the user must check the delivered box to notify other users of the status of the message.

2.13.1 View and Deliver Messages

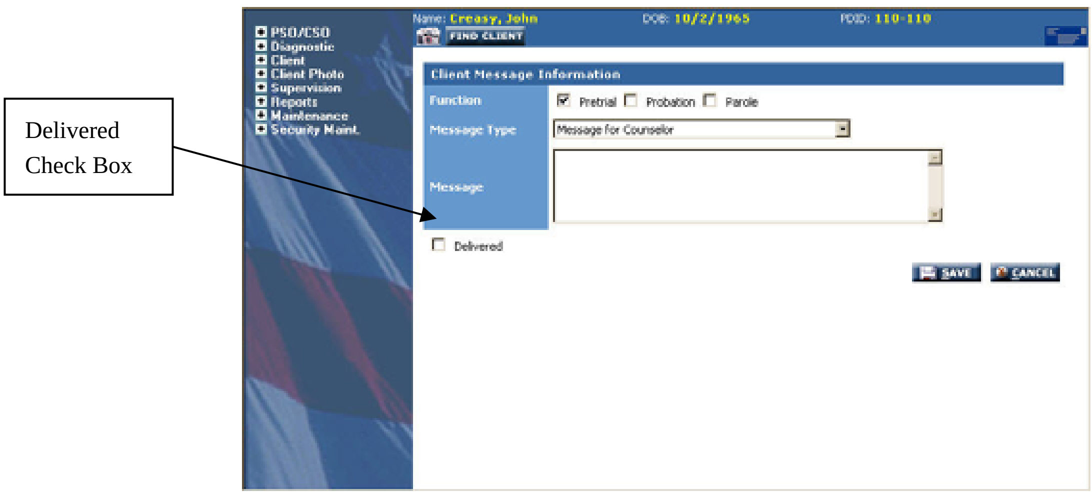
1. Perform the Find Client function and click on the Message menu under the Supervision module. The Client Messages Screen is presented as illustrated in the figure below:



Client Messages Screen

Note: Both delivered and undelivered messages will display. If there are undelivered messages associated with this client, the letter icon  on the header record will be highlighted **YELLOW**. You may also click on the icon from anywhere in PRISM to be taken directly to the Messages List.

2. Click on the message to be viewed and delivered. The Client Message Form is presented as illustrated in the figure below:



Client Message Form

3. If the message has been delivered, click on the Delivered check box.
4. Click . The Messages List Screen is presented with "Yes" under the Delivered column.

Note: After all outstanding messages have been delivered; the letter icon in the upper right corner of the screen goes back to gray. This will alert any users that there are NO undelivered messages for or about the client. After all messages have been delivered, users cannot use the icon to jump to the Messages screen. To view previously delivered messages, you must choose and click on **Messages** module in the **Supervision** menu.

2.13.2 Add New Message

1. Perform the Find Client function and click on the **Messages** module under the **Supervision** menu.
2. The Client Messages Screen is presented.
3. Click on the  button and the Client Message Form is presented.
4. Check off the appropriate Function check box. The check boxes default to Pretrial only.
5. Select type from the Message Type dropdown.
6. Type in the message in the Message box.
7. Check of the Delivered check box ONLY IF the message has already been delivered. Otherwise, leave blank.
8. Click . The Messages List is presented displaying the new message on the list.

3.14 Sanction & Incentives

(This section to be updated/changed in TBD)

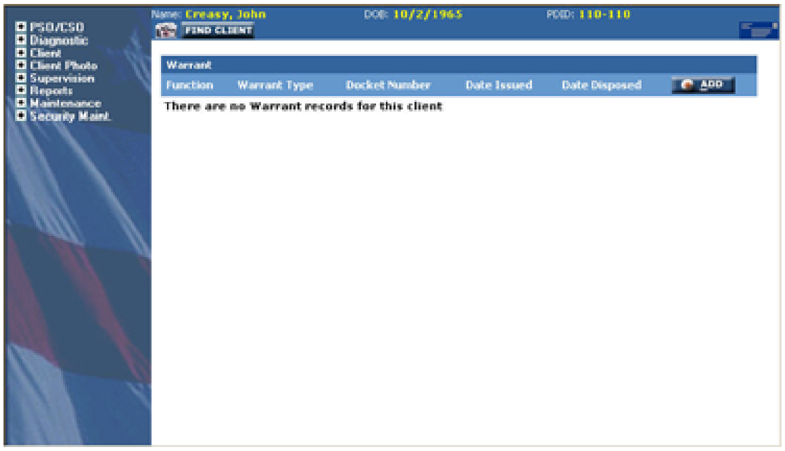
3.15 Warrants

The **Warrants** module is located under the **Supervision** menu.

Purpose: This function is used to enter and view warrant information for a client.

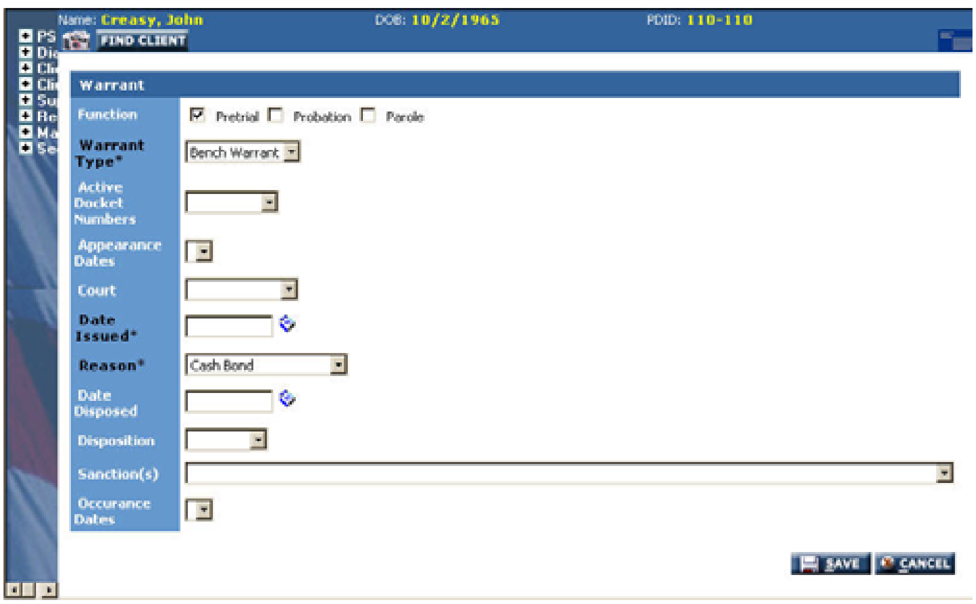
3.15.1 Add a Warrant

1. Perform the Find Client function and click on the **Warrants** module under the **Supervision** menu. The Warrants List is presented as illustrated below:



Warrants list

2. Click on the ADD button and the Warrant form is presented as illustrated below:



Warrant Form

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

3. Check off the appropriate function box. The default value is Pretrial.
4. Select type from the Warrant Type dropdown.
5. From the dropdown, select the docket number for the case in which the warrant was issued.
6. If applicable, select a date from the Appearance Date dropdown.
7. Select the court that issued the warrant from the Court dropdown.
8. Enter the date that the warrant was issued using the Calendar Selector.
9. From the dropdown, select a reason for the issuance of the warrant.
10. If the warrant has been resolved, enter the date that the warrant was disposed and select a disposition from the dropdown.
11. If the warrant was the result of a sanction hearing, select the appropriate sanction from the dropdown and select the date on which the infraction occurred.
12. Record the date on which the sanction occurred in the Occurrence Dates field.
13. Click on the 

button.

3.16 Seal/Unseal Information

The **Seal/Unseal Information** module is located under the **Supervision** menu.

Purpose: This function is used to seal client information. Users may seal Client and Court Case information using this module. Users may seal all of the client's information or select individual modules within the **Client** and **Supervision Case** menus.

Under the Client options, users may seal the following: Name, Address, Education, Employment, Health, Substance Abuse, Associates, and Diagnostic Interview. Under the Court Case options, users may seal the following: Court Case, Release Orders, and Programs.

3.16.1 Seal Client and Supervision Information

1. Perform the Find Client function and click on the **Seal Case** module under the **Supervision** menu. The Seal Case Form is presented as illustrated in the figure below:

Seal Case List

2. To seal all of the client's information, click on the Seal All Information check box. Click and the screen will be updated as illustrated in the figure below:

Seal Case

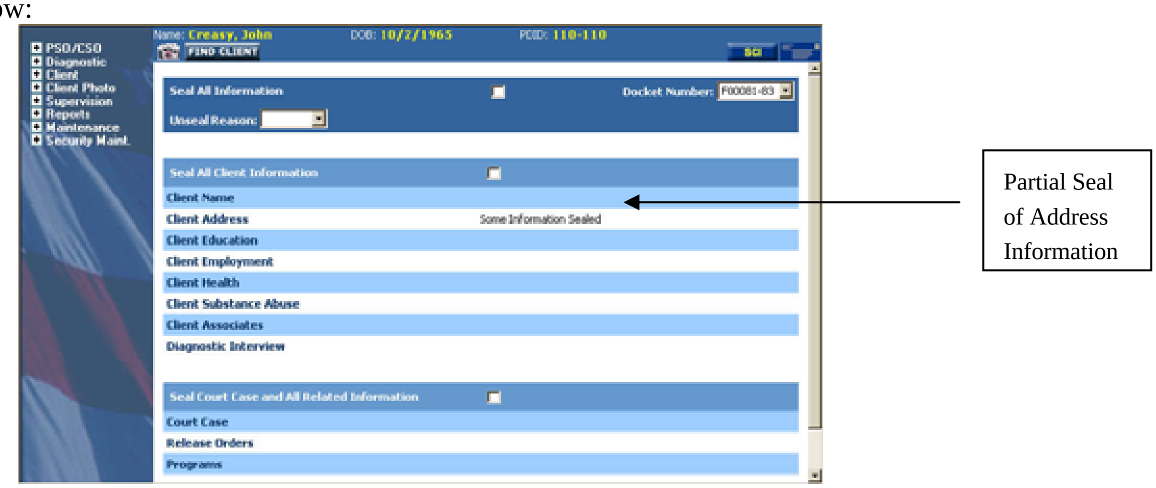
3. To seal only client information, click on the Seal All Client Information check box and click . To only seal the client's court cases and release orders, click on the Seal All Supervision Information check box and click .

Note: In selecting to seal information at the menu level, the user is sealing all of the information in all of the modules listed. To seal individual modules or specific entries in an individual module, users must click on the desired module on the Seal Case List screen.

4. To seal individual client or supervision modules, click on the preferred hyperlink. The entries available for seal are displayed as illustrated in the figure below:

Seal Case, Seal Address Form

5. To seal all of the addresses displayed, click on the Seal All Addresses check box. Click on the individual check boxes to seal specific addresses listed. The Seal Case List screen will be updated to reflect that some information has been sealed as illustrated in the figure below:



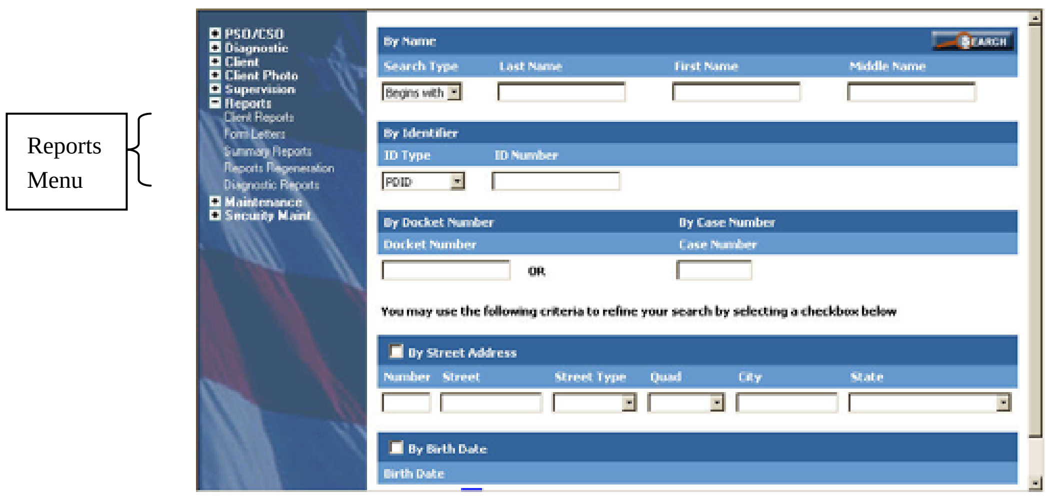
Seal Case List Screen

Note: After any client information has been sealed, the  box is displayed on the screen in the upper right hand corner of the screen next to the Message box.

4.0 Reports

The **Reports** menu, as illustrated in the figure below consists of the following five modules:

- Client Reports
- Form Letters
- Summary Reports
- Reports Regeneration
- Diagnostic Reports



Reports Menu

Purpose: The purpose of the **Reports** Menu is to allow the user to run different reports or letters such as client reports, form letters, summary reports and diagnostic reports.

4.1 Form Letters

The **Form Letters** module is located under the **Reports** menu.

4.1.1 Address Verification

Purpose: This form is used to generate an address verification letter to be mailed to a given client.

The following fields are contained in the Address Verification Letter form:

- Docket Number (the case in which the client has the verification requirement)
- Address (the address to which the user wishes the letter to be mailed)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.2 Advisement of Failure to Appear Notice

Purpose: This letter is prepared to advise the court that a client will not appear for a scheduled court date.

The following fields are contained in the Advisement of Failure to Appear Notice form:

- Active Docket Numbers (the case(s) in which the defendant will fail to appear)
- FTA Date (the scheduled court appearance date in which the defendant will fail to appear)
- US Attorney's Office (the Assistant US Attorney assigned to the failure to appear case)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.3 Advisement of Incarceration-Hospitalization

Purpose: This letter is prepared to advise the court that a client will not appear for a scheduled court date due to incarceration or hospitalization.

The following fields are contained in the Advisement of Incarceration-Hospitalization Letter form:

- Client's Name (pre-populated with the name of the client previously selected)
- Report Header (buttons the user selects to indicate whether the client is incarcerated or hospitalized)
- Docket Number (the case in which the defendant will fail to appear)
- Comments (free text field where the user may add any necessary comments)
- Court Date (the scheduled court appearance date in which the defendant will fail to appear)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.4 Attendance Log

Purpose: This letter provides a record of client's attendance at each court required treatment program session.

The following fields are contained in the Attendance Log form:

- Docket Numbers (the case(s) for which the defendant's attendance is being recorded)
- Letter Content (two fields, one a dropdown list of programs to which the client has been assigned, and two a free text field for the user to indicate the frequency that the client needs to provide the sheet to his or her case manager)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.5 Bench Warrant Notice

Purpose: The purpose for the Bench Warrant Notice letter is to confirm that a client has been arrested and is currently being incarcerated in another jurisdiction.

The following fields are contained in the Attendance Log form:

- Docket Number (the case for which the incarceration concerns)
- Inmate Number (the number under which the client is being incarcerated)
- Incarceration Date (the date on which the client was incarcerated)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.6 Bench Warrant Surety

Purpose: The purpose for the Bench Warrant Surety letter is to inform the court of a client surrendering on a bench warrant in a surety bond case.

The following fields are contained in the Bench Warrant Surety form:

- Docket Numbers (the case under which the client is surrendering)
- Judge Name (the name of the Judge to whom the client is surrendering)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.7 Bench Warrant Warning Letter

Purpose: This letter is used to notify a client of his or her failure to appear and the issuance of a bench warrant for that failure to appear.

The following fields are contained in the Bench Warrant Warning Letter form:

- Docket Number (the case in which the bench warrant was issued)
- Warrant Date (the date on which the bench warrant was issued)
- Address (the client address where the letter is to be sent)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.8 Client Sheet

Purpose: This form provides information on a client’s court case, supervision, and treatment condition.

The following are contained in the Client Sheet form:

- Halfway House (the facility in which the client is being housed)
- Date of Defendant Arrived at the Facility (the date on which the client arrived into the facility)
- Docket Number (the case in which the client has been incarcerated)

- Employer (the name of the client's employer)
- Work Phone (the number of the client's work place)
- Drug(s) of Choice (the substances that the client has historically used)
- Treatment Location (the location at which the client undergoes treatment)
- Counselor (the name of the client's counselor)
- Address (the client's address)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.9 Client's Rights

Purpose: This letter lists the rights a client is entitled to under court ordered PSA supervision.

The following fields are contained in the Client Rights form:

- Docket Number (the docket number under which the client is being supervised)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.10 Clinical Service Review Form

Purpose: This letter provides a means of documenting and evaluating treatment provided to the client.

Note: There are no fields to enter in this document. The form is pre-populated with the selected client's PDID number and defaults to the current date.

4.1.11 Code 541 – Notification of Inclusion

Purpose: This letter notifies the court that in accordance with 33 D.C. Code 541, PSA is forwarding the listed cases to be included in the court's non-public records.

The following fields are included in the Code 541 – Notification of Inclusion Form

- Name (the person to whom the letter is addressed)

- Title (the title of the person to whom the letter is addressed)
- Division (the division within the court system to which the letter is addressed)
- Building (the building of the person to whom the letter is addressed)
- Address 1 (the address of the person to whom the letter is addressed)
- Address 2 (continuation of address 1)
- Docket Numbers (case to which the notification pertains)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.12 Code 541(e) – Notification of Expungement

Purpose: This letter notifies the court that in accordance with 33 D.C. Code 541(e), the cases listed in the letter have been deleted from PSA files, and that the documents have been shredded.

The following fields are included in the Code 541(e) **–** Notification of Expungement Form

- Name (the person to whom the letter is addressed)
- Title (the title of the person to whom the letter is addressed)
- Division (the division within the court system to which the letter is addressed)
- Building (the building of the person to whom the letter is addressed)
- Address 1 (the address of the person to whom the letter is addressed)
- Address 2 (continuation of address 1)
- Docket Numbers (case to which the notification pertains)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.13 Community Phase Checklist

Purpose: The Intensive Supervision Program uses this form to ensure all of the necessary steps are taken prior to releasing a client from the restricted movement phase to the community phase.

The following fields are included in the Community Phase Checklist

- Docket Number (the case in which the client is being considered for community release)
- DTMS (checkbox)
- TARN (checkbox)

- NCIC (checkbox)
- Parole (checkbox)
- Jail (checkbox)
- Superior Court (checkbox)
- PRISM (checkbox)
- Curfew Log (checkbox)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.14 Compliance / Non-Compliance – BW

Purpose: This is the standard report used by PSOs to report a client's compliance to the court.

The following fields are included in the Compliance/Non-Compliance-BW Report:

- From (pre-populated with the user's name)
- RE: (pre-populated with the selected client's name)
- Client AKA (dropdown list)
- Docket Numbers (dropdown box that permits multiple selections for the cases which the report addresses)
- Recipient (radio buttons-Judge [includes dropdown box], Department of Corrections, Corporation Counsel)
- Report Type (dropdown list that details the type of report)
- Report Title (dropdown list that details the report title)
- FTA Reason (dropdown list)
- Release Conditions (pre-populated dropdown box that lists the release conditions addressed in the report-allows for multiple selections)
- Attached Reports (dropdown box listing reports that accompany this report-allows for multiple selections)
- Comments (free text field)
- Recommendations (dropdown list of recommendations to the court for further action-related to drug treatment)
- Actions Taken (dropdown list of actions taken against the client)
- Include Additional Statements (check box)
- Log Report

4.1.15 Confidentiality of Substance Abuse Client Records

Purpose: This report notifies clients' of their rights with respect to their substance abuse records.

The following fields are contained in the Confidentiality of Substance Abuse Client Records letter:

- Docket number (dropdown box)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.16 Consent for Release of Information – APRA

Purpose: This form is used to by PSA to obtain substance abuse treatment information from APRA for an individual client.

The following fields are contained in the Consent for Release of Information-APRA form:

- Other event/Condition (free text field to record any special conditions that result in the discontinuation of the consent)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.17 Consent for the Use of Confidential Information

Purpose: This form is used by PSA to provide substance abuse testing and treatment information to the Department of Corrections.

The following fields are contained in the Consent for the Use of Confidential Information form:

- Docket Numbers (the case in which the consent is being used)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.18 Consent for the Use of Confidential Information – Community Supervision Services

Purpose: This form is used by PSA to provide substance abuse testing and treatment information to CSOSA.

The following fields are contained in the Consent for the Use of Confidential Information-Community Supervision Services form:

- DCDC Number (the client's Department of Corrections number)
- Execution Date (the date that the consent form is completed)
- Expiration Date (the date that consent for information expires)
- Docket Numbers (the case in which the consent is being used)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.19 Consent to Release of Information – Criminal Justice Consent: Substance Abuse Treatment

Purpose: This form gives the client's consent to verbal and written communications between a substance abuse treatment program and PSA.

The following fields are contained in the Consent to Release of Information- Criminal Justice Consent: Substance Abuse Treatment form:

- Docket Numbers (the case(s) in which the consent is being used)
- Program Type (the name of the program from which the consent is being granted)
- Other event/Condition (free text field used to add remarks regarding the consent and its revocation)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.20 Consent to Release of Information – General Consent: Substance Abuse Treatment

Purpose: This report gives the client's consent to verbal and written communication between a substance abuse treatment program and PSA.

The following fields are contained in the Consent to Release of Information- General Consent: Substance Abuse Treatment:

- Docket Numbers (the case(s) in which the consent is being used)
- Program Type (the name of the program from which the consent is being granted)
- Other event/Condition for Expiration (free text field used to add remarks regarding the consent and its revocation)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.21 Consent to Release of Information – HIV/AIDS and Tuberculosis Treatment

Purpose: This report gives the client's consent to verbal and written communication between a treatment program and PSA.

The following fields are contained in the Consent to Release of Information-HIV/AIDS and Tuberculosis Treatment:

- Docket Numbers (the case(s) in which the consent is being used)
- Program Type (the name of the program from which the consent is being granted)
- Other event/Condition (free text field used to add remarks regarding the consent and its revocation)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.22 Consent to Release of Information – Mental Health Treatment

Purpose: This report gives the client's consent to verbal and written communication between a treatment program and PSA.

The following fields are contained in the Consent to Release of Information-Mental Health Treatment:

- Docket Numbers (the case in which the consent is being used)
- Program Type (the name of the program from which the consent is being granted)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.23 Consent to Release of Information – Third Party Disclosure

Purpose: This report gives the client's consent to verbal and written communication between a substance abuse treatment program and PSA.

The following fields are contained in the Consent to Release of Information-Third Party Disclosure form:

- Docket Numbers (the case in which the consent is being used)
- Program Type (the name of the program from which the consent is being granted)
- Information Disclosed (text box of release conditions [drug test results, curfew results, session attendance results] that permits the user to make multiple selections)
- Other Event/Condition (free text field used to add remarks regarding the consent and its revocation)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.24 Curfew Address Verification

Purpose: This form is generated when an address requires verification prior to a client's placement on a curfew.

The following fields are contained in the Curfew Address Verification form:

- Pretrial Services Officer (the PSO requesting the verification)
- Docket Number (the case in which the client is being evaluated
- Name of Home Owner (the homeowner of the address being verified)
- Relationship to Defendant (relationship of the homeowner to the client)
- Address 1 (address of location being verified)
- Address 2 (continuation of the address being verified)
- Telephone (phone number at the address being verified)
- Hours they can be reached (time at which the homeowner may be reached)
- Address Verified (yes or no radio buttons)
- Explanation (free text field to add remarks if address is not verified)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.25 Drug Testing Instructions

Purpose: This form is given to clients who have been placed in testing with PSA. The form details the rules and regulations that are required of an individual testing with PSA.

The following fields are contained in the Drug Testing Instructions form:

- Docket Number (the case in which the client is being placed in testing)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.26 Eligible / Ineligible Letter

Purpose: This letter details the defendant's eligibility or ineligibility for a PSA specialty program.

The following fields are contained in the Eligible/Ineligible Letter:

- Letter Type (radio buttons, Eligible Letter or Ineligible Letter)
- Docket Numbers (dropdown list in which the client was evaluated)
- Judge Name (the Judge to whom the letter is addressed)
- Unit (dropdown list, the program to which the client's eligibility is being determined)
- US Attorney's Office (free text field)
- Defense Counsel (free text field)
- Comments (free text field)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.27 Employment Verification

Purpose: This report verifies that a client is employed and as a result allows them to sign-in and sign-out according to their work schedule.

The following fields are contained in the Employment Verification form:

- Docket Numbers (the case in which the verification involves)
- Date of Request (calendar field, the date on which the form is being submitted)
- Employer (name of client's employer)

- Employer's Address 1 (employer's address)
- Employer's Address 2 (continuation of employer's address)
- Phone Number (employer's phone number)
- Site Information (worksite location information)
- Supervisor (supervisor's name)
- Schedule Information (information pertaining to the client's work schedule)
- Days of Work (client's work days)
- Sign Out Time (time at which the client may be signed out of the facility)
- Sign In Time (time at which the client is expected to sign back into the facility)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.28 Felony Eligibility Checklist

Purpose: This report provides a checklist for determining a client's felony eligibility for Drug Court.

The following fields are contained in the Felony Eligibility Checklist form:

- Questions (4 check boxes that are checked as a client's eligibility is determined)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.29 Felony Placement Form

Purpose: This form is completed by the Drug Court staff and is used as a supplement to a motion to certify a felony case from a felony calendar to the Drug Court calendar.

The following fields are contained in the Felony Placement form:

- Docket Numbers (the case in which the client is being placed)
- Questions (checkboxes that verify the client's eligibility)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.30 Grounds for Immediate Expulsion

Purpose: This form is a list of grounds for a client's immediate expulsion from a program.

The following fields are contained in the Grounds for Immediate Expulsion form:

- Docket Number (the docket number in which the client was in drug treatment)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.31 Heightened Supervision Eligibility Form

Purpose: This form is completed when a client is being evaluated for placement in the Heightened Supervision Program

The following fields are contained in the Heightened Supervision Evaluation form:

- Client's Name (pre-populated based the selected client)
- Evaluated By (dropdown list of PSA staff members)
- Defendant Charged (check box indicating the client has an eligible charge)
- High Risk Supervision Category (check box indicating that the client does not have disqualifying charges)
- Current Drug Court Participant (check box indicating that the client is not currently a Drug Court participant)
- Defendant Lives With (check box indicating that the client currently lives within 50 miles of DC and has an operating telephone)
- Verifier's Name (free text field, name of the person to be verifying the client's address)
- Relationship (free text field, relationship to the client)
- Address (free text field, the address where the client will reside under curfew)
- Telephone (free text field, the telephone number at the curfew address)
- Address Verified (check box)
- Comments (free text field)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.32 Heightened Supervision Orientation Form

Purpose: This form is provided to clients who are placed in the Heightened Supervision Program. The form details the reporting, drug testing, and curfew requirements for a client placed in the program.

The following fields are contained in the Heightened Supervision Orientation form:

- Sanction (radio button to be checked if the client is placed as a sanction-based client)
- Non-Sanction (radio button to be checked if the client is not placed as a sanction-based client)
- Docket Numbers (dropdown list)
- Report Interval (dropdown list that details the client's reporting requirements)
- Report Day 1 (dropdown list that details the day of the week that the client is scheduled to report each week)
- Report Day 2 (dropdown list that details the second day of the week that the client is scheduled to report each week)
- Report from Time (free text field where a PSO would indicate the beginning of the client's reporting window)
- Report to Time (free text field where a PSO would indicate the end of the client's reporting window)
- Curfew Address (free text field)
- Drug Testing Schedule Day 1 (dropdown list that indicates the day of the week that the client is scheduled to report for testing)
- Drug Testing Schedule Day 2 (dropdown list that indicates the second day of the week that the client is scheduled to report for testing)
- Comments (free text field)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.33 Impression Sheet

Note: This form is not currently in use.

4.1.34 Intensive Supervision Halfway House Phase Orientation

Purpose: Clients placed into the Intensive Supervision Program are provided this form that details the rules and requirements while in the halfway house phase of the program.

The following fields are contained in the Intensive Supervision Halfway House Phase Orientation form:

- Docket Numbers (the case in which the client has been placed)
- Case Manager (the client's case manager)
- Address (client's address)
- Remarks (free text box)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.35 ISP Evaluation Form

Purpose: This form is completed when a client is being evaluated for placement in the Intensive Supervision Program.

The following fields are contained in the ISP Evaluation Form:

- Docket Numbers (the case in which the client is being evaluated)
- Date (date field)
- Evaluator's Name (dropdown list of PSA employees)
- ABA DABA/PRISM (free text field)
- Defendant Charged (check box)
- Defendant Not in High Risk (check box)
- Not Drug Court Participant (check box)
- Defendant lives w/in 50 miles (check box)
- Name of Homeowner (the homeowner's name at the client's potential curfew address)
- Relationship (relationship of the homeowner to the client)
- Address (address where the client will reside under the curfew)
- Telephone # (client's phone number at curfew address)
- Address verified (check box)
- Comments (free text field)
- QARN/QNUM (free text field)
- NCIC (free text field)
- Jail Records (free text field)
- DTMS (free text field)
- Parole Probation (free text field)
- Superior Court (free text field)
- Eligible (check box)
- Reason(s) (free text field where the user would complete if the client was found ineligible for placement)

- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.36 Juvenile Contact Random Letter

Purpose: The Drug Testing and Compliance Unit uses this letter when a client is placed in testing for a juvenile matter.

The following fields are contained in the Juvenile Contact Random Letter form:

- To Name (addressed to the client)
- Address 1 (the address of the client)
- Address 2 (the address of the client)
- Social File (client's social file number)
- Petition (client's petition #)
- Judge (Judge assigned to client's case)
- Probation Officer (client's probation officer)
- Social Worker (client's social worker)
- Next Appearance Date (calendar field)
- Content (several free text boxes to indicate who, where, and when the client is to report)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.37 Memo for Referral Packets

Purpose: This report is used to refer a client to treatment.

The following fields are contained in the Memo for Referral Packets form:

- To Name (person to whom the client is being referred for treatment)
- Docket Numbers (the case(s) in which the client is being referred)
- Treatment Modality (dropdown list of the type of treatment)
- Treatment Provider (the program to which the client is being referred)
- Comments (free text field)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.38 Misdemeanor Eligibility Checklist

Purpose: This form provides a checklist to determine a misdemeanor client's eligibility for placement in Drug Court.

The following fields are contained in the Misdemeanor Eligibility Checklist form:

- Questions (4 check boxes that are checked as a client's eligibility is determined)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.39 Misdemeanor Placement

Purpose: This form is completed by the Drug Court staff and is used as a supplement to a motion to certify a misdemeanor case from a misdemeanor calendar to the Drug Court calendar.

The following fields are contained in the Misdemeanor Placement form:

- Diversion and Non-Diversion (radio buttons to indicate if client is diversion eligible)
- Docket Number (the case in which the client is being placed)
- Questions (checkboxes confirming client's eligibility)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.40 Movement Sheet

Purpose: The Intensive Supervision Program uses this form to notify the Department of Corrections of a client's permitted movement outside of the halfway house for verified purposes.

The following fields are contained in the Movement Sheet form:

- Appointment Details (five calendar fields and location text boxes to record the client's schedule)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.41 Notice of Participation in Intensive Supervision

Purpose: This report notified the Department of Corrections that the client has violated conditions of his or her release and as a result is to return to the halfway house.

The following fields are contained in the Notice of Participation in Intensive Supervision form:

- Docket Number (the case in which the client has been participating in Intensive Supervision)
- Community Phase Start Date (field to record the date on which the client was initially released to the community)
- Halfway House Return Date (field to record the date on which the client returned to the halfway house)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.42 Notification of Lack of Bedspace

Purpose: This report is used to inform the court that the Intensive Supervision Program is unable to remand the client to the Department of Corrections halfway house due to lack of bedspace.

The following fields are contained in the Notification of Lack of Bedspace form:

- Docket Number (the case in which the client is participating in Intensive Supervision)
- Date (the date of memorandum)
- Violation Text 1 (text field where the violation information is recorded)
- Violation Text 2 (text field where the violation information is recorded)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.43 Official Release To Intensive Supervision – Community Phase

Purpose: This form is provided to Intensive Supervision Program clients who are being released from the Restricted Movement phase to the Community phase. The form details the rules, regulations, and requirements of the client while participating in the community phase of the program.

The following fields are contained in the Official Release to Intensive Supervision – Community Phase form:

- Docket Number (the case(s) in which the client has been participating in Intensive Supervision)
- Release Date (date on which the client will be released to the Community phase)
- Judge Name (dropdown list of the judge assigned to client's case)
- Court Order Date (date on which the client was placed into the program)
- Report Days (days of the week the client is scheduled to report to his or her case manager)
- Report Date (the first day on which the client is scheduled to report)
- Client Address (dropdown list, address where the client will reside while in the program)
- Home Owner (homeowner's name)
- Telephone Number (phone number at client's curfew address)
- Supervisor Name (name of the PSO who will supervise the client)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.44 Orientation Package

Purpose: This form provides information to clients on the confidentiality of their substance abuse records.

The following fields are contained in the Orientation Package form:

- Docket Number (the case in which the client is being orientated)
- Treatment Phase (the phase of treatment in which the client is participating)
- Times Per Week (free text field)

Note: This form is not currently in use.

4.1.45 Participant Rules Contract

Purpose: This form is a contract provided to a client participating in treatment. It provides the rules and regulations of treatment.

The following fields are contained in the Participant Rules Contract:

- Docket Number (the case in which the client in treatment)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.46 Passport Notice

Purpose: This report notifies the proper authorities that the defendant is not to apply for an issuance of a passport while the action is pending.

The following fields are contained in the Passport Notice form:

- Select Type of Notice (radio buttons used to select the type of notice being sent)
- From (PSO who is sending the notice)
- SSN (client's social security number)
- Passport Received From (the name of the person who surrendered the passport)
- Docket Number (the case in which the client was ordered to not apply for a passport)
- Passport Number (client's passport number)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.47 Receipt of Document

Purpose: This form is used to acknowledge PSA's receipt of either a passport or driver's license that the Court has ordered the client to surrender to PSA.

The following fields are contained in the Receipt of Document form:

- Documents (text box that permits multiple selections used to indicate the document received)
- Docket Numbers (the case in which the client has been ordered to surrender documents)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.48 Release of Document

Purpose: This form is used to serve as official notice of the return of a passport or driver's license to a client.

The following fields are contained in the Release of Document form:

- Documents (text box that permits multiple selections used to indicate the document received)
- Surrender Date (the date on which the document was surrendered)
- Docket Numbers (the case in which the document was surrendered)
- Court Document Review (source that provided case disposition information that permits return of the document)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.49 Rule 118 Certification

Purpose: This report certifies that all document in the PSA files (including computerized records) relating to the arrest of the client have been eliminated pursuant to Rule 118.

The following fields are contained in the Rule 118 Certification form:

- Name (the person to whom the letter is addressed)
- Prefix (addressee's name prefix)
- Title (addressee's title)
- Division (addressee's division)
- Building (addressee's building name)
- Address 1 (addressee's address)
- Address 2 (continuation of addressee's address)
- Docket Number (case in which the information has been eliminated from PSA records)
- SSN# (client's social security number)
- Arrest Date (client's arrest date)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.50 Rule 118 Forward

Purpose: This form notifies the proper authorities that in response to a Rule 118 Certification request, there is no interview file or report on the case(s) cited. Further, no record of the arrests exists in the agency computer banks.

The following fields are contained in the Rule 118 Forward form:

- Name (the person to whom the letter is addressed)
- Title (addressee's title)
- Division (addressee's division)
- Building (addressee's building name)
- Address 1 (addressee's address)
- Address 2 (continuation of addressee's address)
- Docket Number (the case in which the request was made)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.51 Rule 40 Letter

Purpose: This report verifies the transfer of a client from one district to another.

The following fields are contained in the Rule 40 Letter form:

- Docket Number (DC case number)
- Name (name of letter recipient)
- Agency Name (name of agency receiving the client)
- District Name (name of the federal district receiving the client)
- Address 1 (address to which the letter is being sent)
- Address 2 (address to which the letter is being sent)
- Address 3 (address to which the letter is being sent)
- Conversation Date (date where initial phone contact was made with the receiving agency)
- SSN# (client's social security number)
- Other District Docket# (docket number assigned by the receiving federal district)
- Bail Report Date (date on which PSA produced a report for the client)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.52 Rule 46 Notice

Purpose: This report documents that a client has failed to post bond and as a result remains confined in the D.C. Jail.

The following fields are contained in the Rule 46 Notice form:

- Docket Number (the case in which the client is being held)
- Judge (Judge to which the letter is addressed)
- Comments (free text field)
- Cc (free text field)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.53 Spot Test Form

Purpose: This form is used to refer a client to the Drug Testing and Compliance Unit for a spot drug test.

The following fields are contained in the Spot Test Form:

- Alias (client's alias)
- Docket Number (the case(s) in which the client is being referred)
- Test Type (random test or spot check options)
- Remarks (free text field)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.54 Warning Notice

Purpose: This letter is used to warn a client regarding his or her failure to comply with release conditions.

The following fields are contained in the Warning Notice form:

- Docket Number (the case in which the client is in violation)
- Release Condition (text box that permits multiple selections, list of conditions of release that this notice is addressing)
- Address (client's address)
- Comments (free text field)
- Cc (free text field)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.1.55 Written Notice of Court Appearance

Purpose: This report verifies that the client is aware of his or her court appearance and next scheduled appointment with PSA.

The following fields are contained in the Written Notice of Court Appearance form:

- Docket Number (the case in which the client is being reminded)
- Appointment Date (date of the client' appointment)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2 Client Reports

The **Client Reports** module is located under the **Reports menu.**

4.2.1 Change of Status Form

Purpose: The Change of Status Form provides a report indicating a change to a client's treatment program status. A copy of the report is sent to the COTR to ensure that billing for the treatment program is adjusted accordingly.

The following fields are contained in the Change of Status Form:

- Program Name (the name of the program to which the client is participating)
- Case Manager's Name (client's case manager's name)
- COTR (the name of the COTR)
- Defendant's Name (client's name)
- AKA (client aliases)
- Docket Numbers (the case in which the client is participating in treatment)
- Reason for Status Change (free text box)
- User Comments for Reason for Status Change (free text box)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.2 Contact Report

Purpose: The Contact Report provides a summary listing of a client's Check-in contacts over a specific period of time.

The following fields are contained in the Contact Report form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Client AKA (client's aliases)
- Associate (a dropdown list of individuals to whom the report is to be forwarded, i.e., Judge, Probation Officer, Defense Attorney, Prosecutor)
- Name (field that the user enters the name of the intended recipient)

Note: If the associate chosen is a judge, the Name field will be a dropdown list of Judges names associated with defendant cases. If any other associate is chosen, Name remains a free text field.

- Primary Docket Numbers (the case for which the report is being generated)
- Associated Docket Numbers (open cases that the user selects to display on the report)
- Comments (user may add any necessary comments)
- Release of Information (check box to indicate that a release of information has been completed)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.3 Court Notification Letters

Purpose: These letters are generated and sent to defendants prior to a scheduled court appearance date to inform defendants of their upcoming court dates and any changes in their court dates.

Users may send single notices to individual clients or generate batch reports for every client with an upcoming court appearance date. The default value for the batch reports is 20 days lead-time but users may change the amount of advance notice as needed.

The following fields are contained in the Court Notification Letters form:

- Run a (radio buttons to indicate if a single letter is to be generated or a batch job)

- Lead Time in days (must be a value of 1 through 20)
- Date Range (read-only field automatically updated according to the lead time selected)
- Client Docket Numbers (open cases with pending appearance dates)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

Note: Subsequent reports may be generated in situations wherein a client's court date has been changed.

4.2.4 Curfew Report

Purpose: This report will serve as a complete chronological history of a client's performance with respect to the curfew condition. The report illustrates when a client is both compliant and non-compliant with the curfew release condition.

The following fields are contained in the Curfew Report form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Client AKA (client aliases)
- Associate (a dropdown list of individuals to whom the report is to be forwarded, i.e., Judge, Probation Officer, Defense Attorney, Prosecutor)
- Name (field that the user enters the name of the intended recipient)

Note: If the associate chosen is a judge, the Name field will be a dropdown list of Judges names associated with defendant cases. If any other associate is chosen, Name remains a free text field.

- Primary Docket Numbers (the case for which the report is being generated)
- Associated Docket Numbers (open cases that the user selects to display on the report)
- Comments (free text field that the user may add any necessary comments)
- Release of Information (checkbox to indicate if a release of information has been completed)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.5 Defendant Supervisory Log

Purpose: This report illustrates a chronological history of all supervision remarks, drug test results, and contacts the defendant has had with PSA. The report is displayed in chronological order and may be filtered by the activity type.

The following fields are contained in the Defendant Supervisory Log form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Activity Type (allows the user to filter the information that will be displayed on the report, i.e., only supervisory logs, only drug test results, etc.)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

Note: This report is for internal supervision and management, and for internal distribution only.

4.2.6 Drug Status Report

Purpose: This report provides a compete history of a client's performance under a drug testing release condition. The report illustrates when a client is both compliant and non-compliant.

The following fields are contained in the Drug Report form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Client AKA (client aliases
- Associate (a dropdown list of individuals to whom the report is to be forwarded, i.e., Judge, Probation Officer, Defense Attorney, Prosecutor)
- Name (field that the user enters the name of the intended recipient)

Note: If the associate chosen is a judge, the Name field will be a dropdown list of Judges names associated with defendant cases. If any other associate is chosen, Name remains a free text field.

- Primary Docket Numbers (the case for which the report is being generated)
- Associated Docket Numbers (a list of additional open cases that the user selects to display on the report)
- PSA, CSOSA Check boxes (check boxes where the user may choose to display PSA test results, CSOSA test results, or both)

- Comments (free text field that the user may add any necessary comments)
- Release of Information (checkbox to indicate that a release of information has been completed)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.7 Executed Releases of Information

Purpose: This report provides a summary all releases of information executed over a selected date range for a given defendant.

The following fields are contained in the Executed Releases of Information form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.8 Referral to Program Name

Purpose: This form is used to refer a client to treatment program.

The following fields are contained in the Referral to Program Name form:

- Alias (client aliases)
- Docket Number (case(s) for which the client is being referred)
- Agency Name (the name of the treatment provider)
- Appointment Date (date on which the client is to report)
- Appointment Time (the time at which the client is to report)
- Address (client's address)
- Include Substance Abuse History (checkbox)
- Alcohol and Substance Abuse (checkbox)
- Mental Health (checkbox)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.9 Referrals Issued Report

Purpose: This report provides a summary of all treatment referrals, over a selected date range for a given client.

The following fields are contained in the Referrals Issued Report form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.10 Report Log Report

Purpose: This report provides a summary all logged reports run over a selected date range for a given defendant.

The following fields are contained in the Report Log Report form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.11 Substance Abuse Treatment Compliance Form

Purpose: This report requests compliance information from a substance abuse treatment, mental health treatment, or social service provider.

The following fields are contained in the Substance Abuse Treatment Compliance Form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Program Name (the name of the program that information is being requested)
- Program Official's Name (name of the person from whom information is being requested)
- Client AKA (client aliases)
- Docket Numbers (the case(s) in which the client is participating in treatment)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.12 Summary Compliance Report

Purpose: This report contains a summary of a defendant's compliance with release conditions for an open case(s).

The following fields are contained in the Summary Compliance Report form:

- Date Range (the range of dates that the user requests to be displayed in the report)
- Docket Numbers (the case(s) for which the report is being generated)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.2.13 Treatment Referral Package

Purpose: This document is prepared to identify all requisite information submitted to the Treatment Program Analyst/COTR to refer a defendant to a treatment program. Without this completed document, the defendant cannot be processed for referral to a treatment center.

The following fields are contained in the Treatment Referral Package form:

- To (the COTR to whom the user is sending the packet)
- Client AKA (client aliases
- Docket Numbers (the cases for which the client is being referred)
- Treatment Modality (the modality recommended based upon the client's ASI)
- Treatment Provider (agency providing the treatment
- Comments (free text field where the user may add any necessary comments)
- Items included the packet (check boxes that indicate that the required documentation is accompanying the request form)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.3 Summary Reports

The **Summary Reports** module is located under the **Reports** menu.

4.3.1 Agent Notification Report

Purpose: This report contains a summary of all of the agent-generated notices sent to a given supervision unit during a given time period.

The following fields are contained in the Agent Notification Report form:

- Date Range (calendar fields)
- Unit (supervision unit for which the report is being generated)
- Log Report (a record of the report will be recorded in the **Supervision Log** module if this box is checked)

4.3.2 Bench Warrant List Report

Purpose: This report contains a list of open bench warrants during a specified time period.

The following fields are contained in the Bench Warrant List Report form:

- Report Type (dropdown list, select open, closed or all)
- From Date (bench warrants issued from this date)

- To Date (bench warrants issued to this date)

4.3.3 Case Load Activity Report

Purpose: This report contains a summary of a case manager's caseload for a specified date range.

The following fields are contained the Case Load Activity Report form:

- Date Range (range of dates the report to display)
- Unit (unit to which the case manager is assigned)
- Unit Case Managers (text box that permits multiple selections that is pre-populated with the list of case managers for the selected unit])

4.3.4 Case Load Bench Warrant

Purpose: This report contains a summary of bench warrant information for a specific case manager's caseload curing a specified date range.

The following fields are contained in the Case Load Bench Warrant Report form:

- Date Range (range of dates the report to display)
- Unit (unit to which the case manager is assigned)
- Unit Case Managers (text box that permits multiple selections that is pre-populated with the list of case managers for the selected unit])
- Warrant Status (radio buttons, Both, Outstanding, and Closed are the options)

4.3.5 Case Load Court Date List

Purpose: This report contains a summary of court dates for a case manager's caseload during a specified date range.

The following fields are contained in the Case Load Court Date List form:

- Date Range (range of dates the report to display)
- Unit (unit to which the case manager is assigned)

- Unit Case Managers (text box that permits multiple selections that is pre-populated with the list of case managers for the selected unit])

4.3.6 Case Load Summary Report

Purpose: This reports contains a summary of client information, release conditions, and appearance dates for a specific case manager's caseload.

The following fields are contained in the Case Load Summary Report form:

- Unit (unit to which the case manager is assigned)
- Unit Case Manager (dropdown list pre-populated with the case manager's for the selected unit)
- Include Release Conditions (check box used to indicate whether to list the release conditions on the report)

4.3.7 Case Load Summary

Purpose: This report displays the current caseload status for each case manager in a given supervision unit. The report displays the number of cases supervised, the number of clients supervised, the number of active bench warrant cases and clients, and the total unit numbers.

Note: This report does not have any fields to enter. The report is automatically generated based upon the user's (a supervisor) unit.

4.3.8 Check-In Time Breakdown

Purpose: This report contains a summary list that breaks down the number of check-ins for a specific drug testing location broken down by time.

The following fields are contained in the Check-In Time Breakdown form:

- Date Range (range of dates the report to display)
- Unit (unit to which the case manager is assigned)

4.3.9 Compliance Assessment Report

Purpose: This report lists the clients for a specific unit, broken down by case manager, and date that their next compliance assessment is due.

The following fields are contained in the Compliance Assessment Report form:

- Date Range (range of dates the report to display)
- Unit (unit to which the case manager is assigned)

4.3.10 Court Appearance Report

Purpose: This report contains a list of all of the clients scheduled to appear in a specific courtroom on a specified date.

The following fields are contained in the Court Appearance Report form:

- Court Type (dropdown list of court assignments)
- Court Date (date on which the report is to reflect)

4.3.11 Daily Drug Test Results

Purpose: This report contains a summary listing of all drug test results by unit on a specific date.

The following fields are contained in the Daily Drug Test Results form:

- Test Date (drug testing date)
- PSA, CSOSA, All radio buttons (select the desired filter)
- Unit (unit for which the report is to display test results)
- Team (team for which the report is to display test results)

4.3.12 Daily Management Reports FTAs/ Incomplete Disposition

Purpose: This report lists all clients (broken down by unit) who failed to appear for a scheduled drug test or have incomplete dispositions.

The following fields are contained in the Daily Management Report FTAs/Incomplete Dispositions form:

- Drug Test Date (testing date to be reflected on the report)
- Unit Team Report, Program Report radio buttons
- PSA, CSOSA radio buttons
- Unit (unit for which the report is to display FTA clients)
- Team (team for which the report is to display FTA clients)
- Output Option (radio buttons, Both, FTA only, Incomplete disposition only)

4.3.13 Detailed Caseload

Purpose: This reports lists a summary of all of the clients assigned to a specific PSO in a specific unit.

The following fields are contained in the Detailed Caseload form:

- Select PSO (case manager for which the report is being generated)
- Display Release Conditions (yes or no radio buttons)

4.3.14 Detailed Court Appearances (Supervisor)

Purpose: This report lists all of the court appearances for a specific date range for a specific unit.

The following fields are contained in the Detailed Court Appearances (Supervisor) form:

- Start Date (calendar field)
- End Date (calendar field)
- Display Release Conditions (yes or no radio buttons)

4.3.15 Detailed Court Appearances By Case Manager/Court Rep

Purpose: This report lists all of the court appearances for a specific date range for a specific case manager or court representative.

The following fields are contained in the Detailed Court Appearances By Case Manager/Court Rep form:

- Start Date (calendar field)
- End Date (calendar field)
- Case Manager/Court Rep (radio buttons with corresponding dropdown lists)
- Display Release Conditions (yes or no radio buttons)

4.3.16 Detailed Court Calendar

Purpose: This report contains a summary listing of all court appearances for a specific unit by a specified date range and calendar.

The following fields are contained in the Detailed Court Calendar form:

- Start Date (calendar field)
- End Date (calendar field)
- Calendar (dropdown list)
- Display Release Conditions (yes or no radio button)

4.3.17 Drug Status Report (Batch)

Purpose: By a date range, this function provides a batch of drug status reports.

The following fields are contained in the Drug Status Report (Batch) form:

- Date Range (calendar fields)

4.3.18 Lockup Drug Test Results

Purpose: This report lists all of the lockup drug test results for a specified date.

The following fields are contained in the Lockup Drug Test Results form:

- Drug Test Date (calendar field)

4.3.19 Sanction Callback Report

Purpose: This report contains a summary of defendants' drug test results and sanctions for a specific date, broken down by unit.

The following fields are contained in the Sanction Callback Report form:

- Drug Test Date (calendar field)
- Unit Team Report and Program Report radio buttons
- PSA and CSOSA radio buttons
- Unit (dropdown list)
- Team (dropdown list)
- All, Complete, and Incomplete radio buttons

4.3.20 Team Task List

Purpose: This report provides a summary of the tasks for each PSO within a given unit.

Note: There is no Team Task List form. When the user (a supervisor) clicks on the Team Task List module, the report is automatically generated and is displayed in the new window.

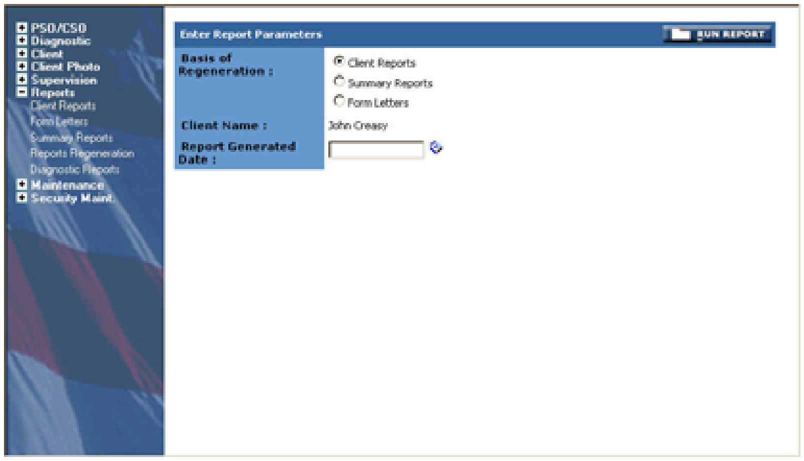
<u>4.4 Reports Regeneration</u>

The **Reports Regeneration** module is located under the **Reports** menu.

Purpose: This function is designed to allow the user to regenerate reports were printed for a client on a specific date without having to re-enter the parameters.

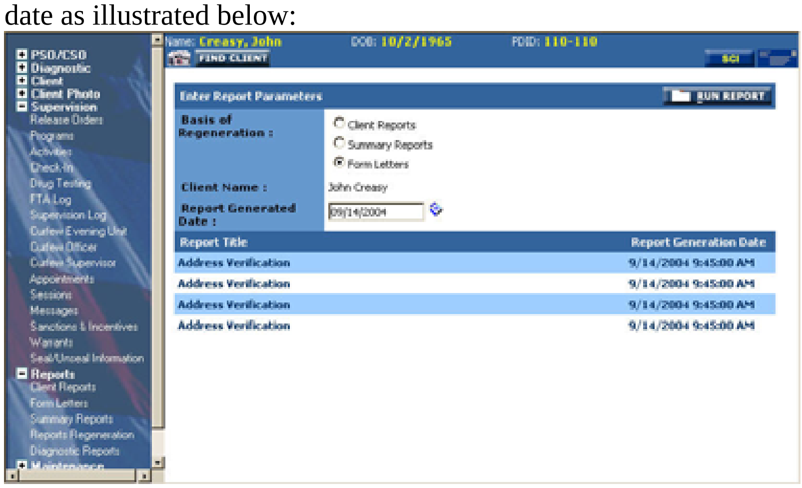
4.4.1 Regenerate a Report

1. Perform the Find Client function and click on the **Reports Regeneration** module on the **Reports** menu. The Reports Regeneration form is presented as illustrated below:



Reports Regeneration form

2. Using the radio buttons presented, select the basis for the regeneration.
3. Enter the date of the report to be regenerated.
4. The Reports Regeneration form is updated with a list of reports that were generated on that date as illustrated below:



Reports Regeneration form

5. Click on the report to be regenerated. Enter comments as needed and click .

6. The regenerated report will be presented for viewing and/or printing.

4.5 Diagnostic Reports

[Intentionally Removed – 04/22/2009dkc]